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Lewis & Clark Interest & Awareness Study

WAVE 2

Prepared for:

Idaho Department of Commerce
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INTRODUCTION

NFO Plog Research is pleased to present this report of quantitative research. This second wave, a follow-up to the benchmark 2000 study, is designed to gauge awareness and interest of travelers in the 2003-2006 Lewis & Clark Bicentennial Commemoration. Results will help planners understand and increase familiarity with the Commemoration and provide knowledge about travelers who are most likely to participate.

The structure of this report is as follows:

- Research Objectives
- Methodology
- Key Findings
- Conclusions and Recommendations
- Detailed Findings
- Appendix

  A. Venturer/ Dependable Concept

  B. Destination Life Cycle

  C. Questionnaire

RESEARCH OBJECTIVES

The Lewis & Clark Expedition was commissioned during Thomas Jefferson's presidency to explore and chart the newly purchased American Northwest. Beginning in Illinois on May 14, 1804, Lewis & Clark reached the Pacific Ocean in November 1805 and returned to St. Louis on September 23, 1806. The information they gathered was of great help in the settlement of the West.

A Bicentennial Commemoration of the Lewis & Clark Expedition and the events leading to its inception is planned for 2003-2006. Many sites along the Lewis & Clark Trail and other attractions with historical relevance to the expedition will be included in the Commemoration.

The benchmark 2000 study was designed to gauge awareness and interest in the 2003-2006 Lewis & Clark Bicentennial, and this second wave provides subsequent comparative data. Specific objectives include:

- Profile respondent (U.S. residents responding to the survey) demographics, psychographics, travel characteristics, and reasons to take vacations
- Understand awareness of and interest in the Lewis & Clark Expedition and the upcoming 2003-2006 Lewis & Clark Bicentennial
- Assess perception of related advertising/ public relations/ media attention, including state media mentions and influence on travel plans
- Determine familiarity with, past visitation to, and expected future visitation to Lewis & Clark states and specific attractions located in them
- Estimate interest in different Lewis & Clark activities
- Collect transportation/ accommodation preferences when traveling and information sources used for choosing destinations

Throughout this report results are presented on an aggregate level – Lewis & Clark Wave II survey respondents – and comparisons are made among select groups:

- Lewis & Clark Wave I respondents

- Total U.S. adults (from NFO Plog Research's **2002** and **2000 American Traveler Survey**)
- Those indicating familiarity with the original expedition and/or the Commemoration
- Those indicating interest in the story of the expedition and/or in the Commemoration
- History Buffs
- Venturers
- Income, age, and travel frequency segments when appropriate

EFFECT OF SEPTEMBER 11

Differences between the benchmark 2000 study and this second wave need to be considered in light of changes in travel behavior since September 11. Most of those who took a domestic leisure trip last year did not change their plans, but those who did were more likely to decrease rather than increase their leisure travel. Trip distance is a considerable factor – the further a destination is from home, the greater the likelihood that a traveler would "cut back" travel plans.

Therefore, "drive-to" destinations were affected much less than "fly-to" sites, because c*ar travel* was more resilient than *air travel*. U.S. adults tended to increase their travel plans by automobile. In contrast, they reduced their air travel plans, especially to international destinations. Greater domestic travel holds positive implications for the Lewis & Clark Bicentennial and participating states.

METHODOLOGY

Data were collected via a self-administered, four-page mail questionnaire. A nationally representative sample was selected from the NFO Panel, the world's largest consumer panel (600,000+ households).

A total of 2,500 questionnaires were mailed October 14, 2002. Five weeks later (November 18), a total of 1,670 completed returns (67%) easily exceeded the minimum quota of 1,400.

1,670 completed surveys at the 95% confidence level represent results at ± 2 to 3 percent.

FIGURE 1
APPROXIMATE SAMPLING TOLERANCES AT 95% CONFIDENCE INTERVAL

Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,670	1.5	2.0	2.2	2.4	2.5

KEY FINDINGS

AWARENESS AND INTEREST

- Over half (54%) of those surveyed are very or somewhat familiar with the Lewis & Clark Expedition and familiarity rises to about six in ten of those in key markets: frequent (4+ trips/year) travelers (61%), venturers (59%, see Appendix for full description of venturer/dependable concept), and mature (55+) individuals (62%).

- Three Wave II respondents in five (59%) are very or somewhat interested in the Lewis & Clark Expedition story. Again, the proportion rises among respondents that are frequent travelers (65%), venturers (70%), and older (63%).

- The proportion who report some level of familiarity (very/somewhat) with the Bicentennial in Wave II (13%) increases threefold from the benchmark 2000 study (5%). Among select groups of 2002 respondents, nearly half (45%) of history buffs are aware of the upcoming Commemoration, with almost one history buff in five (18%) very or somewhat familiar. Frequent travelers (18%) and venturers (20%) also outpace comparable Wave I respondents (7% and 10%, respectively, see Figure 13).

- Developing interest and awareness for the upcoming 2003-2006 Bicentennial will require focused, concentrated advertising and publicity. Fortunately, there is considerable interest in visiting commemorative sites/ events among the general public (31% very or somewhat interested), especially among those most likely to visit: frequent travelers (39%) and venturers (39%).

- Recognition of past advertising/ public relations is minimal (11%). States mentioned most often by those who have seen Bicentennial media are Missouri (28%) and Oregon (27%).

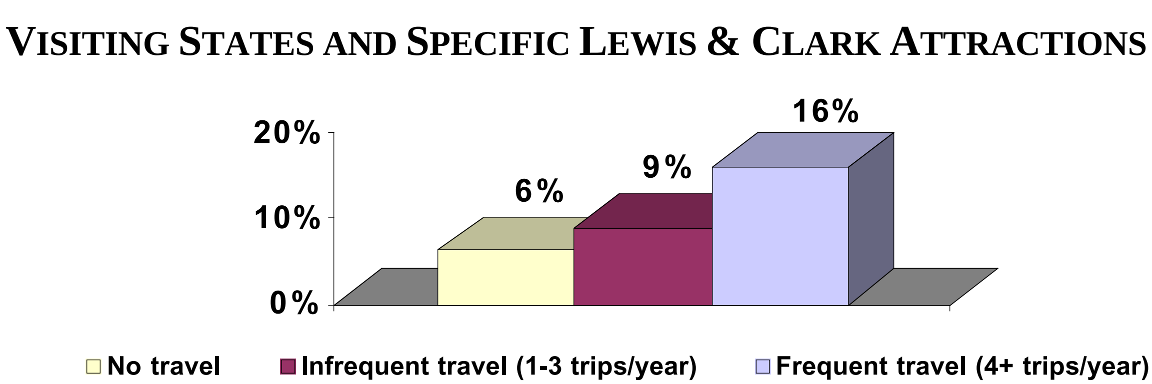
- People are very receptive to Lewis & Clark activities. Foremost among them are: attending a (general) Lewis & Clark event (47%), a driving tour with interpretive materials (46%), and re-enactments/ shows/ musicals/ theater (41%).

FIGURE 2
AWARENESS OF AND INTEREST IN LEWIS & CLARK EXPEDITION AND 2003-2006 BICENTENNIAL
SELECTED CHARACTERISTICS

		Familiar With Lewis & Clark Expedition		Interest In Story Of Lewis & Clark Expedition		Familiar With Lewis & Clark Bicentennial		Interest In Visiting Bicentennial Site/Event	
	Total	Very/ Somewhat	Heard Of/ Not Familiar	Very/ Somewhat	Not Very/ Not At All	Very/ Somewhat	Not Very/ Not At All	Very/ Somewhat	Not Very/ Not At All
BASE: Total	100%	54%	46%	59%	41%	13%	88%	31%	70%
History Buffs*	**36**	**64**	**36**	**74**	**26**	**18**	**82**	**46**	**54**
LEISURE TRIPS**									
None	15	46	55	53	47	11	90	22	78
One to three	53	53	48	57	43	10	90	28	72
Four or more	**32**	**61**	**39**	**65**	**35**	**18**	**82**	**39**	**61**
PSYCHOGRAPHICS									
Dependable	30	47	54	48	52	9	91	24	76
Centric	59	57	43	62	38	13	88	32	68
Venturer	**12**	**59**	**41**	**70**	**30**	**20**	**80**	**42**	**58**
INCOME									
Under $40,000	28	51	49	58	42	14	87	30	70
$40,000-$74,999	36	56	44	58	42	12	88	30	70
$75,000 or more	36	55	45	61	40	12	88	31	69
AGE									
Under 40	25	44	57	54	46	7	93	27	73
40-54	35	53	47	59	41	12	88	33	67
55 or older	41	62	38	63	38	17	83	30	70

NOTE: Bold indicates specific group of focus throughout this report
* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Percentages may not sum to 100 due to rounding.

FIGURE 3
ADVERTISING, PR, PRINT, OR TV DOCUMENTARY/ NEWS STORY RECOGNITION
TOTAL RESPONDENTS: % (YES)



- Generally, state visitation in the past 12 months and past three years is proportionally similar to plans for future travel. Virginia (26%), Washington (21%), and Missouri (18%) lead for travel in the past three years, Virginia (15%), Washington (14%), and Oregon (12%) for plans for future travel.

- However, five percent (or fewer) of Wave II respondents cite Lewis & Clark sites or events as the reason for their intention to visit any of these states during the next three years.

- Further, Wave II respondents have not visited many Lewis & Clark related sites/ attractions. Of 23 selected sites, only four have been visited by more than 10 percent of U.S. adults: Monticello – VA (34%), Harper's Ferry – WV (31%), Jefferson National Expansion Memorial – MO (28%), and the Columbia River Gorge – OR/WA (27%). As expected, however, recognition and visitation proportions rise substantially among Wave II respondents who are aware of the upcoming Bicentennial Commemoration.

ABOUT LEISURE TRAVEL

- The majority of respondents that express any interest (very/ somewhat/ not very) in visiting a Bicentennial attraction would stay in a hotel/ motel/ B&B (69%) and drive (61%) if visiting a Lewis & Clark site/ event.

- People take vacations for a variety of reasons: *to have fun* (83%), *relax/ get rid of stress* (66%), *see and do new things* (62%), and *get away from schedules* (61%). Compared to the general population, history buffs show greater enthusiasm for travel, citing that (history buffs/all adults): *travel is an important part of my life* (56%/34%), *see/ do new things* (88%/62%), *enrich my perspective on life* (70%/45%), and *feel alive/ energetic when traveling* (66%/48%).

- Friends/ relatives (56%) remain the primary source of information for leisure travel planning. The Internet tops the list of alternative sources, with much higher consideration than in 2000 of specific sites/ features, such as travel web sites, airline web sites, and e-mail notifications. Meanwhile, reliance on off-line resources declines (travel agents, toll-free 800 numbers) or remains somewhat stable (print sources such as brochures, travel guides, magazines).

CONCLUSIONS AND RECOMMENDATIONS

Interest in and awareness of the Lewis & Clark Expedition has increased since the benchmark wave of this study, but recognition of the upcoming Bicentennial remains low. Advertising/ public relations, much of which is forthcoming, has not yet been perceived by the public. Future efforts to "spread the word" should successfully draw visitors, based on the much higher level of interest among respondents who are aware of the Commemoration. Going forward, states featuring Bicentennial attractions need to:

- ➢ Position related sites/ events as "destinations of choice" for history buffs, venturers, and centrics. Feature their uniqueness and their appeal to those who seek areas less overcrowded and "commercial."

- ➢ Take advantage of the increased attractiveness of "drive-to" destinations and short getaways (1-3 nights).

- ➢ Market the Bicentennial Commemoration to different demographic groups in varied ways. Respondents of all ages use the Internet when planning travel, but especially younger and middle-age travelers. Younger travelers are typically more interested in attractions that involve outdoor activities. Members of this group are most likely to travel with children, and are more likely to camp or take a recreational vehicle. Older respondents, who more often rely on travel agents, may opt for driving tours with interpretative materials or group tours. Literature distributed to travel agents should feature these activities.

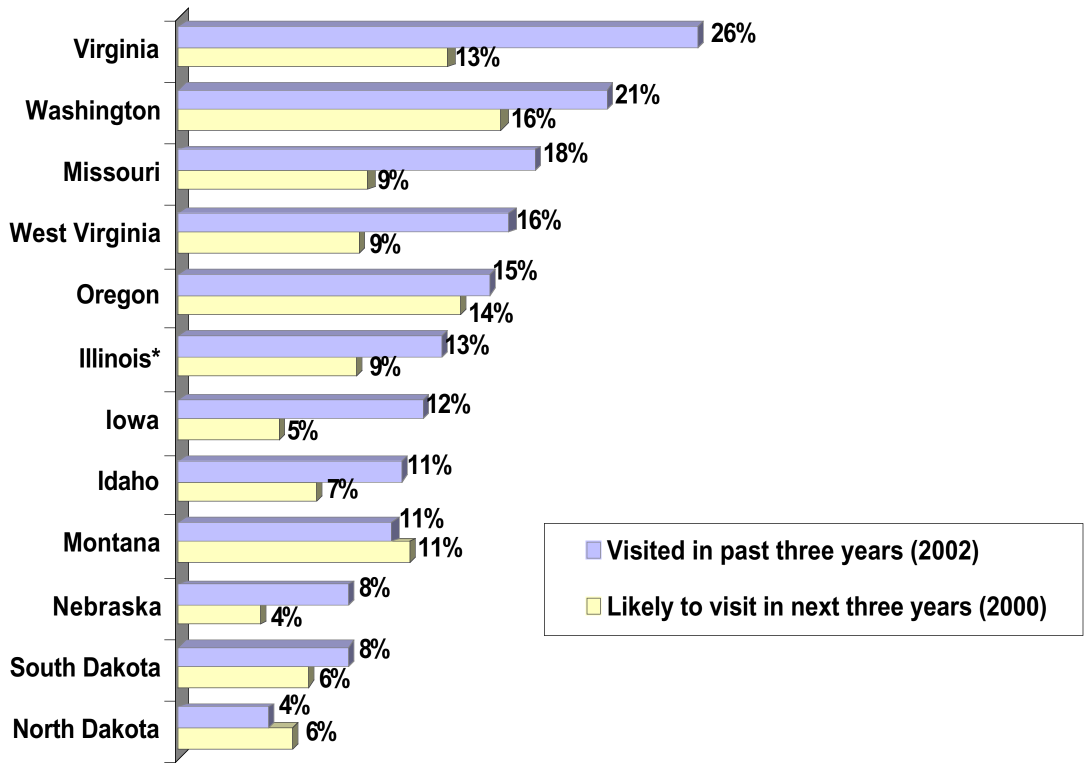
- ➢ As recommended previously, partner with hotels, car rental agencies, and auto clubs to promote the sites and attractions. The Lewis & Clark Bicentennial can be viewed as an enhancement to general marketing efforts rather than a separate issue.

- ➢ Usually, the Lewis & Clark Commemoration will not be the main reason for visitation, even among key visitor groups, and should not be treated as such. Expedition sites/events can be made more attractive by packaging them with local options and areas of interest.

- ➢ Finally, actual travel to destinations usually exceeds expectations. In part, this indicates that many have not yet decided where they will vacation and illustrates that advertising and promotions have the opportunity to influence those choices. The benchmark and follow-up surveys offer an opportunity to compare plans versus actual travel – and each destination fares better than expected (see Figure 4).

FIGURE 4
VISITING LEWIS & CLARK COMMEMORATIVE STATES

VISITED IN PAST THREE YEARS (2002) VS. LIKELY TO VISIT IN NEXT THREE YEARS (2000)



* **Illinois data are taken from NFO Plog Research 2000 and 2002 *American Traveler Survey***
** **Percentages are roundest to the nearest whole number**

DETAILED FINDINGS

RESPONDENT PROFILE

DEMOGRAPHICS/ PSYCHOGRAPHICS

Demographics and psychographics lead this section to better understand characteristics of survey participants and selected groups. Compared to overall U.S. adults (from NFO Plog Research **2002 American Traveler Survey** (**ATS**), an annual, nationally representative study of American's travel and leisure habits and preferences), Lewis & Clark respondents:

- Are somewhat older (51 vs. 47)
- Are less likely to be married (63% vs. 73%)
- Earn more ($56,000 annually vs. $49,000)
- Have more formal education (45% vs. 30% with college degrees)
- Tend to be more venturesome (12% vs. 7%)

Figure 5 includes profiles of two important groups: Wave II history buffs (37%, respondents who indicate that "gaining knowledge of history or other cultures" is an important reason for taking a vacation, see Figure 33) and venturers (12%, see Appendix for full description of venturer/dependable concept). Key differences between these individuals and overall respondents include:

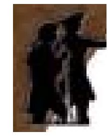
- History buffs are older (54) than overall respondents (51) and venturers (48)
- Venturers' median household income ($66,000) exceeds that of history buffs and total respondents ($56,000 each)
- Over half (53%) of venturers are college graduates, a greater proportion than history buffs (48%) and all respondents (45%)
- One history buff in six (17%) classifies as venturer, compared to just one overall respondent in eight (12%)

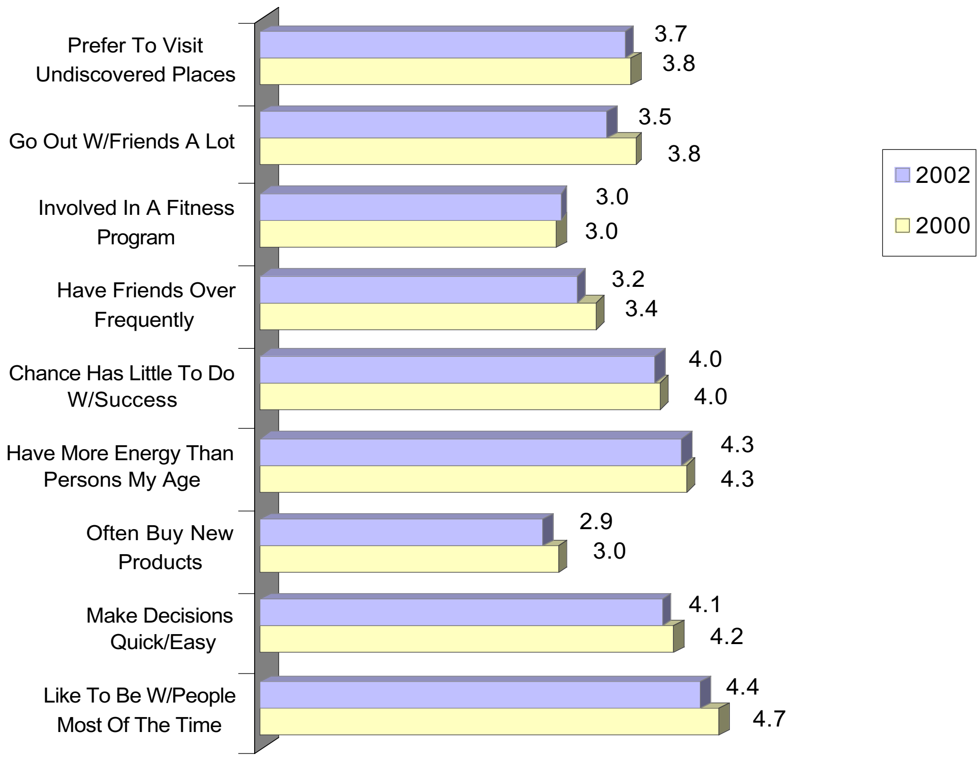
FIGURE 5
DEMOGRAPHICS/ PSYCHOGRAPHICS
U.S. ADULTS AND LEWIS & CLARK RESPONDENTS: 2002 VS. 2000

	Total U.S. Adults (Rep. Sample)		Lewis & Clark Respondents		2002 Respondents	
	2002	2000	2002	2000	History Buffs (37% of Total)	Venturers (12% of Total)
BASE:	9,129	–	1,674	1,400	594	187
Retired	22%	22%	21%	20%	24%	18%
Married	73	56	63	62	60	64
AGE*						
Under 40	34	36	25	30	18	29
40-54	33	28	35	33	34	32
55+	34	35	41	37	48	39
Median (years)	47	46	51	49	54	48
INCOME*						
Under $40,000	42	54	28	32	29	22
$40,000 - $74,999	30	30	36	36	37	30
$75,000+	28	16	36	33	34	48
Median (in 000 s)	$49	$37	$56	$54	$56	$66
EDUCATION*						
High School Or Less	28	32	17	21	15	15
Some College/ Associate s Degree	42	39	38	38	37	33
College Graduate +	30	29	45	41	48	53
PSYCHOGRAPHICS*						
Dependable	32	30	30	26	23	–
Centric	61	62	59	51	61	–
Venturer	**7**	**8**	**12**	**23**	**17**	**100**

* Percentages may not sum to 100 due to rounding.

FIGURE 6
PERSONAL ATTRIBUTES
LEWIS & CLARK SURVEY RESPONDENTS INDICATING STATEMENT APPLIES TO THEM: 2002 VS. 2000
(MEAN SCORES ON A 7-POINT SCALE)





TRAVEL CHARACTERISTICS

Respondents take (on average) about three (3.2) trips annually. Frequent travelers (4+ trips/ year) comprise one-third (32%) of the total group, while about one respondent in seven does not travel (15%). History buffs travel somewhat more frequently each year (3.5 trips) than overall respondents (3.2), but less than venturers (4.4).

Similar patterns emerge for vacation days. Venturers lead (19.4 vacation days), followed by history buffs (18.1) and overall Americans (16.4).

FIGURE 7
OVERNIGHT LEISURE TRIPS AND VACATION DAYS IN THE PAST 12 MONTHS
TOTAL RESPONDENTS: 2002

	Lewis & Clark II Respondents		
	Total	History Buffs (37% of Total)	Venturers (37% of Total)

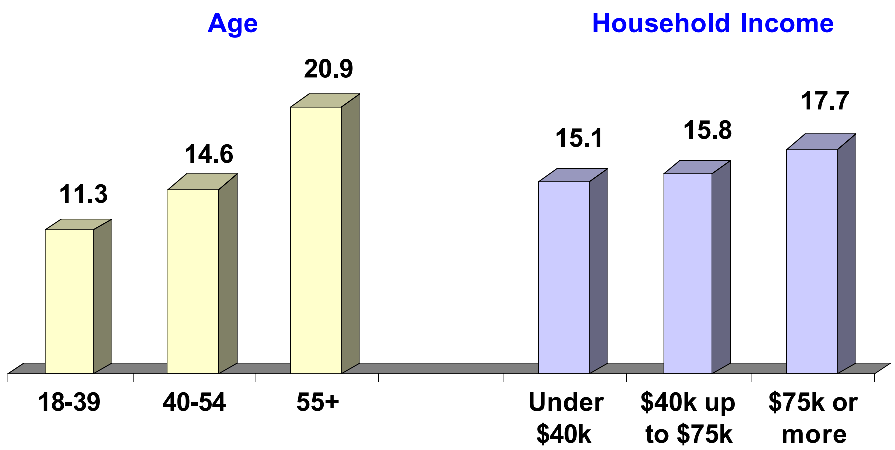
BASE:	1,674	594	187
OVERNIGHT LEISURE TRIPS			
None	15%	14%	12%
1-3	53	52	42
4+	32	35	46
Mean (trips)	3.2	3.5	4.4
BASE: Any leisure trips			
VACATION DAYS			
5 or fewer	12%	10%	9%
6-10	24	21	17
11-15	23	25	22
16-25	22	21	27
26+	14	19	22
Don t know/ no answer	6	5	4
Mean (days)	16.4	18.1	19.4

* Percentages may not sum to 100 due to rounding.

As expected, the number of available vacation days also varies by demographic characteristics. Older (55+) respondents have more vacation days (20.9) than younger travelers; those with higher incomes ($75,000+) have more than others (17.7).

FIGURE 8
VACATION DAYS IN THE PAST 12 MONTHS

RESPONDENTS WHO HAVE TAKEN A LEISURE TRIP IN THE PAST 12 MONTHS: 2002 (MEAN)



LEWIS AND CLARK EXPEDITION – AWARENESS AND INTEREST

This section discusses familiarity with and interest levels in the Lewis & Clark Expedition and the upcoming 2003-2006 Bicentennial Commemoration. Awareness levels of related sites/ activities and the states of these attractions are discussed as well.

FAMILIARITY WITH THE 1803-1806 LEWIS & CLARK STORY

Four out of five (84%) Americans have heard about the 1803-1806 Lewis & Clark Expedition. Over half (54%) claim to be very or somewhat familiar with this historical episode, slightly above the proportion of Wave I (52%) participants.

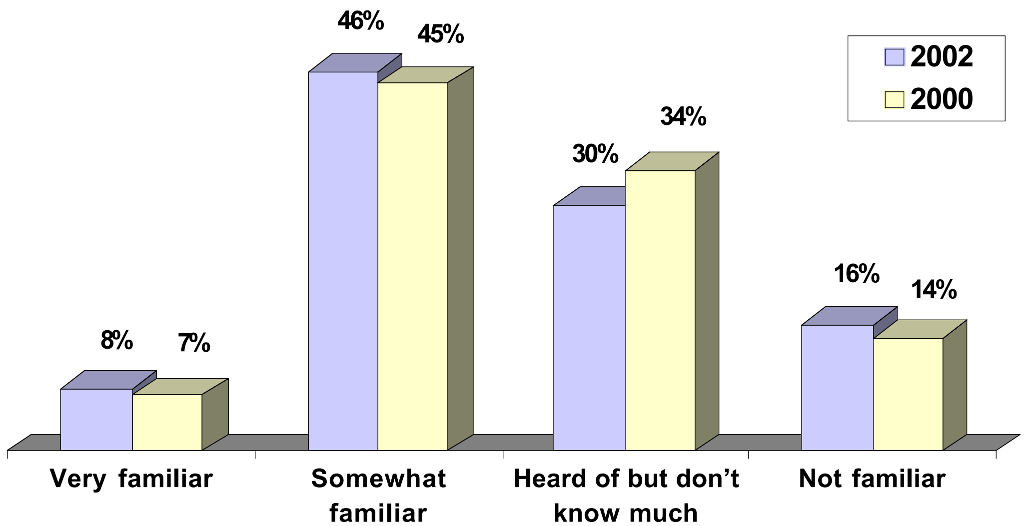
The Wave II groups that report the highest familiarity with the Lewis & Clark Expedition replicate the benchmark survey: frequent travelers, venturers, and mature travelers (55+).

FIGURE 9
OVERALL FAMILIARITY WITH 1803-1806 LEWIS & CLARK EXPEDITION
SUMMARY CHART OF SELECTED CHARACTERISTICS: 2002 VS. 2000

	Total	Very Familiar + Somewhat Familiar		Heard Of But Don t Know Much		Not Familiar	
Selected Characteristics	2002	2002	2000	2002	2000	2002	2000
BASE:	1,674	908	722	505	479	261	195
Total Respondents	**100%**	**54%**	**52%**	**30%**	**34%**	**16%**	**14%**
History Buffs*	**36**	**64**	**66**	**24**	**26**	**12**	**9**
LEISURE TRIPS**							
None	15	46	N/A	35	N/A	20	N/A
One to three	53	53	N/A	30	N/A	17	N/A
Four or more	**32**	**61**	**55**	**28**	**33**	**11**	**12**
PSYCHOGRAPHICS							
Dependable	30	47	41	34	41	19	18
Centric	59	57	54	29	34	14	12
Venturer	**12**	**59**	**58**	**27**	**30**	**13**	**13**
INCOME							
Under $40,000	28	51	50	29	32	20	19
$40,000-$74,999	36	56	50	31	37	13	13
$75,000 or more	36	55	55	30	34	15	11
AGE							
Under 40	25	44	46	37	39	20	15
40-54	35	53	53	33	36	14	12
55 or older	41	62	56	24	30	14	15

* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Wave I respondents were required to have taken at least one overnight trip in the previous 12 months and were not reported in comparable fashion to Wave II.
*** Percentages may not sum to 100 due to rounding.
Note: Key groups represent the following percentages of the total 2002 Wave II respondents: Frequent travelers=32%, History Buffs=37%, Venturers=12%, $75k+=36%, 55+ years=41%.

FIGURE 10
FAMILIARITY WITH THE 1803-1806 LEWIS & CLARK EXPEDITION BY WAVE



TOTAL RESPONDENTS: 2002 VS. 2000

INTEREST IN THE 1803-1806 LEWIS & CLARK EXPEDITION

Interest (very/ somewhat) in the 1803-1806 Lewis & Clark Expedition appears to be increasing, but marginally: 59% vs. 57%. Further, the increase occurs among those who are very interested (11% vs. 9%). As expected, history buffs show particularly high interest levels (74% very/ somewhat interested), as do venturers (70%), older (55+) respondents (63%), and those who earn over $75,000 each year (61%).

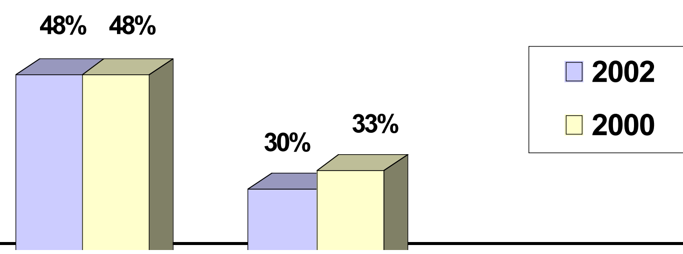
FIGURE 11
OVERALL INTEREST IN THE 1803-1806 LEWIS & CLARK EXPEDITION STORY
SUMMARY CHART OF SELECTED CHARACTERISTICS: 2002 VS. 2000

	Total	Very + Somewhat Interested	Not Very + Not At All Interested

Selected Characteristics	2002	2002	2000	2002	2000
BASE:	1,674	989	791	685	602
Total Respondents	**100%**	**59%**	**57%**	**41%**	**43%**
History Buffs*	**36**	**74**	**75**	**26**	**25**
LEISURE TRIPS**					
None	15	53	N/A	47	N/A
One to three	53	57	N/A	43	N/A
Four or more	**32**	**65**	**59**	**35**	**41**
PSYCHOGRAPHICS					
Dependable	30	48	47	52	53
Centric	59	62	57	38	43
Venturer	**12**	**70**	**66**	**30**	**34**
INCOME					
Under $40,000	28	58	53	42	47
$40,000-$74,999	36	58	59	42	41
$75,000 or more	36	61	58	40	42
AGE					
Under 40	25	54	54	46	46
40-54	35	59	57	41	43
55 or older	41	63	59	38	41

* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Wave I respondents were required to have taken at least one overnight trip in the previous 12 months and were not reported in comparable fashion to Wave II.
*** Percentages may not sum to 100 due to rounding.

FIGURE 12
INTEREST IN THE STORY OF THE LEWIS & CLARK EXPEDITION BY WAVE
TOTAL RESPONDENTS: 2002 VS. 2000



FAMILIARITY WITH THE 2003-2006 LEWIS & CLARK BICENTENNIAL

While many U.S. adults are aware of the Lewis & Clark Expedition, familiarity with the 2003-2006 Bicentennial is considerably lower. That said, however, the proportion who report some level of familiarity (very/somewhat) with the Bicentennial in Wave II (13%) increased threefold since the benchmark 2000 study (5%).

Among select groups of 2002 respondents, nearly half (45%) of history buffs are aware of the upcoming Commemoration, with almost one history buff in five (18%) very or somewhat familiar. Frequent travelers (18%) and venturers (20%) also outpace comparable Wave I respondents (7% and 10%, respectively, see Figure 13). No familiarity trend emerges along age divisions, but older respondents, more of whom are aware of and interested in the Expedition, report higher familiarity with the Bicentennial than younger respondents (42% among respondents 55+ vs. 26% among those under 40 years of age).

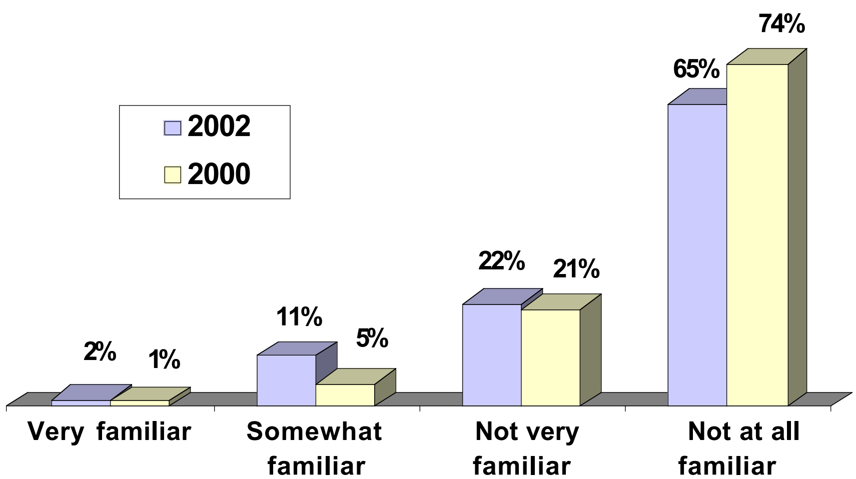
FIGURE 13
OVERALL FAMILIARITY WITH THE 2003-2006 LEWIS & CLARK BICENTENNIAL
SELECTED CHARACTERISTICS: 2002 VS. 2000

	Total	Very Familiar + Somewhat Familiar		Heard About It But Don t Know Much		Not Familiar	
Selected Characteristics	2002	2002	2000	2002	2000	2002	2000

BASE:	1,674	209	75	372	291	1,093	1,025
Total Respondents	**100%**	**13%**	**5%**	**22%**	**21%**	**65%**	**74%**
History Buffs*	**36**	**18**	**8**	**27**	**26**	**55**	**66**
LEISURE TRIPS**							
None	15	11	N/A	20	N/A	69	N/A
One to three	53	10	N/A	23	N/A	67	N/A
Four or more	**32**	**18**	**7**	**22**	**23**	**60**	**71**
PSYCHOGRAPHICS							
Dependable	30	9	4	18	14	73	82
Centric	59	13	4	25	23	63	73
Venturer	**12**	**20**	**10**	**23**	**24**	**57**	**67**
INCOME							
Under $40,000	28	14	5	22	21	65	74
$40,000-$74,999	36	12	5	23	21	65	74
$75,000 or more	36	12	6	22	21	66	73
AGE							
Under 40	25	7	4	19	15	74	82
40-54	35	12	5	21	21	67	74
55 or older	41	17	7	25	26	58	67

* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Wave I respondents were required to have taken at least one overnight trip in the previous 12 months and were not reported in comparable fashion to Wave II.
*** Percentages may not sum to 100 due to rounding.

FIGURE 14
FAMILIARITY WITH THE UPCOMING 2003-2006 LEWIS & CLARK BICENTENNIAL BY WAVE
TOTAL RESPONDENTS: 2002 VS. 2000



RECOGNITION OF 2003-2006 LEWIS & CLARK BICENTENNIAL MEDIA

Few Wave II respondents (11%) have seen media coverage of the 2003-2006 Lewis & Clark Bicentennial, such as advertising, public relations, print or TV documentaries/ news stories. Of the segments, venturers (17%), frequent travelers (16%), and history buffs (16%) express greater awareness. Evidence exists that coverage of the upcoming Commemoration boosts interest – of those who saw related media, the proportion interested in visiting a Bicentennial site/event (20%) is three times greater than those (7%) who are not interested.

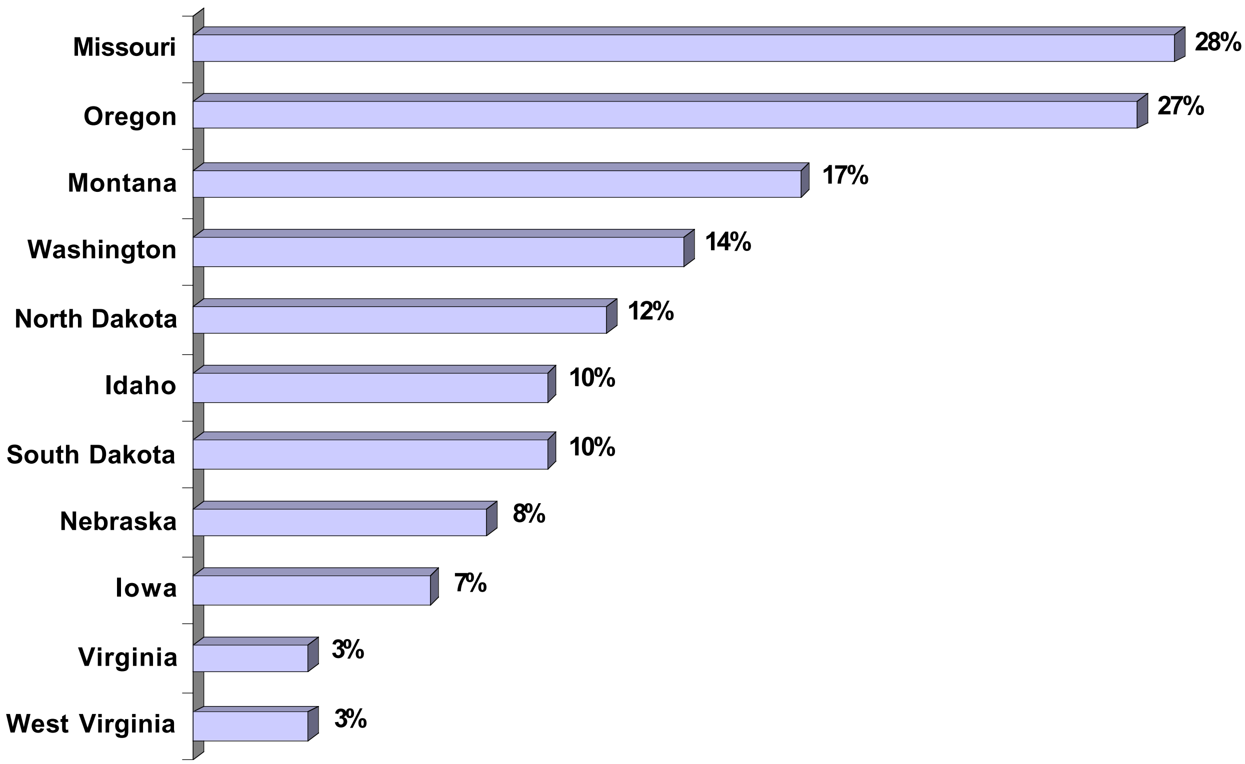
FIGURE 15
ADVERTISING, PR, PRINT, OR TV DOCUMENTARY/ NEWS STORY RECOGNITION
SELECTED GROUPS AMONG TOTAL RESPONDENTS

		Saw Advertising, PR, Print, or TV Documentary/ News Story	
Selected Characteristics	Total	Yes	No

BASE:	1,674	180	1,494
Total Respondents	**100%**	**11%**	**89%**
Familiar with Lewis & Clark Bicentennial	13	52	48
Not familiar with Lewis & Clark Bicentennial	88	5	95
Interest in visiting Bicentennial site/ event	31	20	80
Not interested in visiting Bicentennial site/ event	70	7	93
History Buff	**36**	**16**	**84**
Not History Buff	64	8	92
Frequent leisure travel	**32**	**16**	**84**
Infrequent leisure travel	53	9	91
No leisure travel	15	6	94
Venturer	**11**	**17**	**83**
Centric	55	10	90
Dependable	28	9	91

Missouri (28%) and Oregon (27%) are most often cited when respondents are asked to recall state(s) to which the Bicentennial media refer. Other states exceeding 10 percent include: Montana (17%), Washington (14%), and North Dakota (12%). However, more than four respondents in ten (43%) cannot assign a state to the advertising/ public relations/ documentary or news story they remember.

FIGURE 16



ADVERTISING, PR, PRINT, OR TV DOCUMENTARY/ NEWS STORIES BY STATE
SAW 2003-2006 LEWIS & CLARK BICENTENNIAL MEDIA

Nine Wave II survey participants out of ten (90%) who saw Bicentennial media indicate that these materials do not influence their current trip planning. Even among those interested in visiting a Bicentennial site or event, most report that the media they saw have no influence (86%).

FIGURE 17
INFLUENCE OF SEEING ADVERTISING, PR, PRINT, OR TV DOCUMENTARY/ NEWS STORY

SAW 2003-2006 LEWIS & CLARK BICENTENNIAL MEDIA	Total	Interested In Visiting Bicentennial Site/Event
BASE:	180	100
Total Respondents	**11%**	**20%**
Determining factor where to vacation	3	5
Determining factor in deciding to take a trip somewhere	4	7
Added an overnight stay to an already planned trip	1	1
Added 1+ days to an already planned trip	3	5
No influence on current trip planning	90	86

* Multiple responses could be given to this question

INTEREST IN VISITING 2003-2006 LEWIS & CLARK BICENTENNIAL SITE/ EVENT

Interest in participating in the 2003-2006 Bicentennial declined from Wave I. In Wave II, three in 10 (31%) respondents expressed interest (very/somewhat) in visiting a site or attending an event, compared to four in ten (39%) Wave I respondents. While those interested in the Lewis & Clark story (48%) and those familiar with the Bicentennial (61%) demonstrate a greater desire to participate in Bicentennial proceedings, these percentages also fall short of Wave I results (61% and 75%, respectively).

As seen in Wave I, frequent travelers and venturers lead within their respective groups. No clear pattern emerges by age.

FIGURE 18
OVERALL INTEREST IN VISITING SITE/ ATTENDING EVENT DURING 2003-2006 BICENTENNIAL
SELECTED CHARACTERISTICS: 2002 VS. 2000

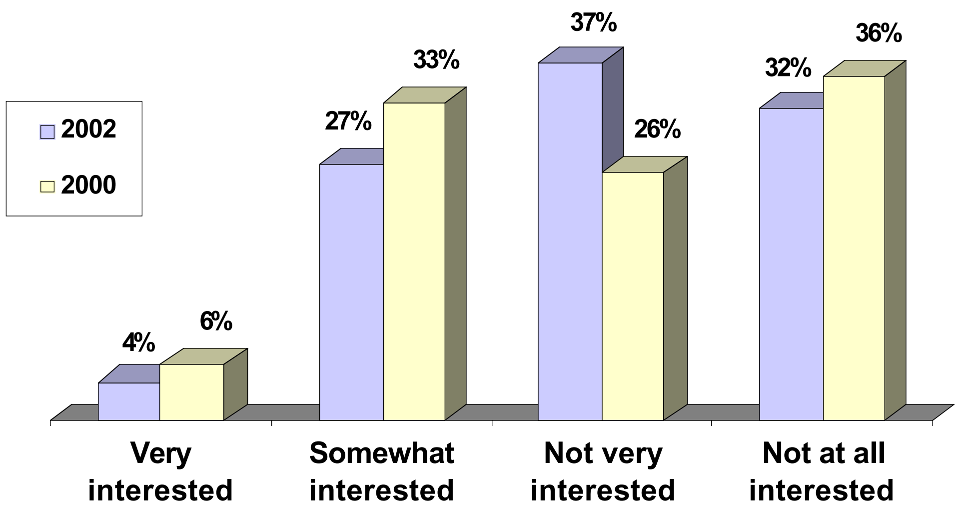
	Total	Very + Somewhat Interested		Not Very + Not At All Interested	
Selected Characteristics	2002	2002	2000	2002	2000

BASE:	1,674	511	539	1,163	860
Total Respondents	**100%**	**31%**	**39%**	**70%**	**62%**
Interested in Lewis & Clark story	**59**	**48**	**61**	**52**	**39**
Familiar With Bicentennial	**13**	**61**	**75**	**39**	**25**
LEISURE TRIPS					
None	15	22	N/A	78	N/A
One to three	53	28	N/A	72	N/A
Four or more	**32**	**39**	**42**	**61**	**58**
PSYCHOGRAPHICS					
Dependable	30	24	32	76	68
Centric	59	32	39	68	61
Venturer	**12**	**42**	**46**	**58**	**54**
INCOME					
Under $40,000	28	30	34	70	66
$40,000-$74,999	36	30	41	70	59
$75,000 or more	36	31	41	69	59
AGE					
Under 40	25	27	39	73	61
40-54	35	33	43	67	58
55 or older	41	30	34	70	66

* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Wave I respondents were required to have taken at least one overnight trip in the previous 12 months.
*** Percentages may not sum to 100 due to rounding.

FIGURE 19
INTEREST IN VISITING 2003-2006 BICENTENNIAL SITE/ ATTENDING EVENT BY WAVE

LEWIS & CLARK ACTIVITIES



The Wave II questionnaire gauges appeal of specific activities among those who are very or somewhat interested in visiting a historic Lewis & Clark site or an event during the upcoming Bicentennial. Almost all respondents (96%) are interested in one or more activity, led by half (50%) that express a desire to visit an *interpretive center or museum*. Also attractive to Lewis & Clark survey participants are:

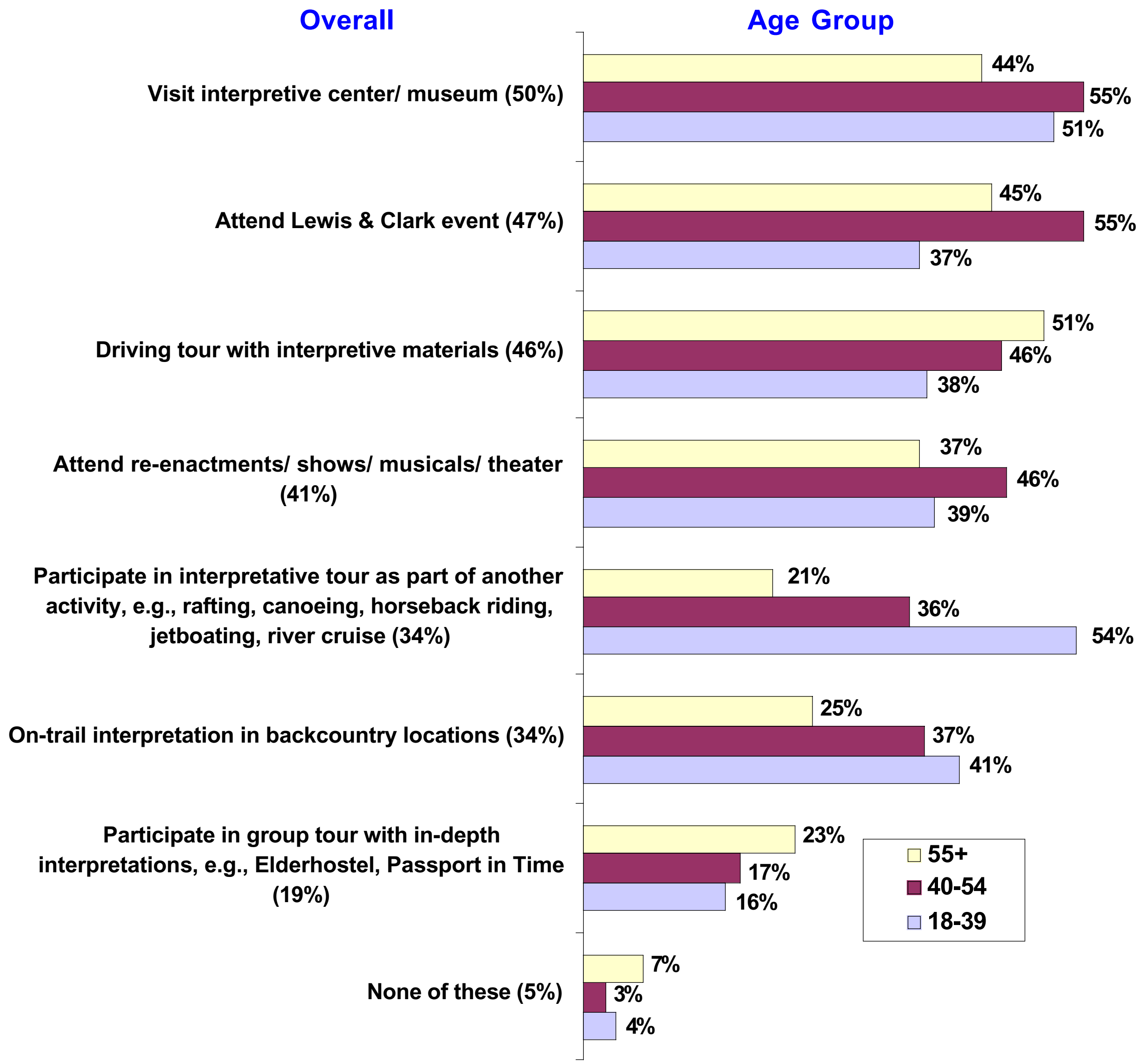
- *Attend Lewis & Clark event* (47%)
- *Driving tour with interpretive materials* (46%)
- *Attend re-enactments/ shows/ musicals/ theater* (41%)

One-third of survey respondents have an interest in participating in an *interpretive tour as part of another activity* (34%) and an *on-trail interpretation in backcountry locations* (34%).

As anticipated, preferred activities vary by age. Younger survey respondents who are interested in participating in the upcoming Commemoration favor integrating an *interpretive tour with another outdoor activity* (e.g., rafting, canoeing, horseback riding, etc.) These individuals are also most amenable to an *on-trail interpretation in backcountry locations*.

Alternatively, older people are drawn more to a *driving tour with interpretive materials* and a *group tour with in-depth interpretations.*

FIGURE 20
LEWIS & CLARK ACTIVITIES LIKELY TO PARTICIPATE IN
VERY/ SOMEWHAT INTERESTED IN VISITING HISTORIC LEWIS & CLARK SITE/ EVENT: 2002



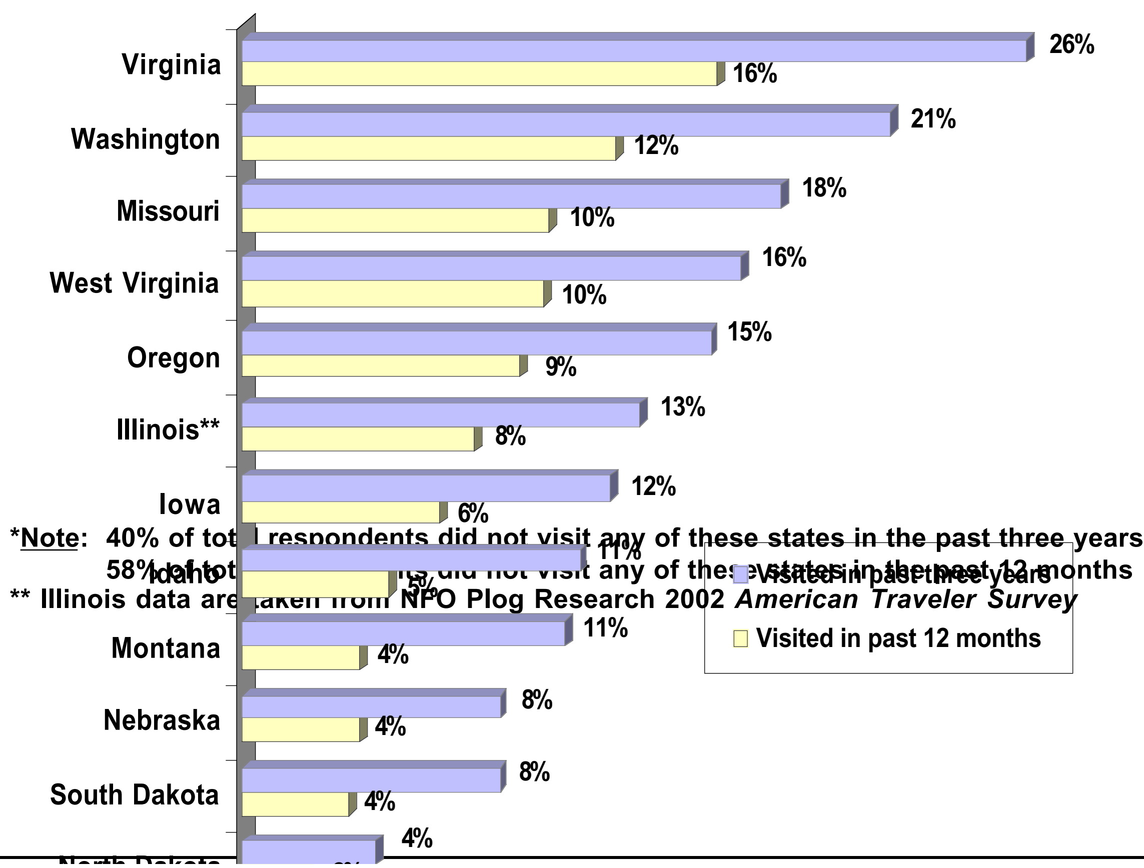
VISITING LEWIS & CLARK COMMEMORATIVE STATES

Virginia was visited by the greatest proportion of Wave II respondents, over both twelve month (16%) and three year (26%) time periods. Washington (12% and 21%) and Missouri (10% and 18%) follow, with West Virginia (10% and 16%) and Oregon (9% and 15%) rounding out the top five most visited Lewis & Clark commemorative states over the past three years.

FIGURE 21
LEWIS & CLARK COMMEMORATIVE STATES VISITED IN 12 MONTHS/ THREE YEARS
TOTAL RESPONDENTS: 2002

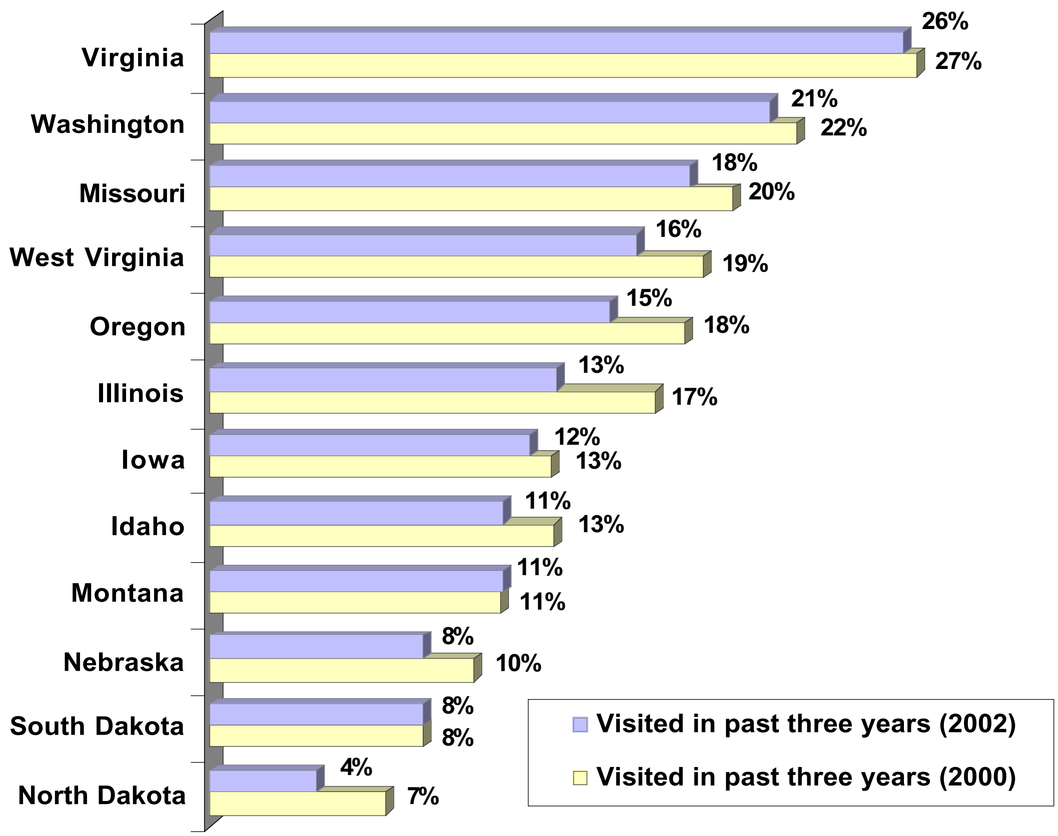
While some slippage appears for most states, Wave II and Wave I state visitation incidences over a three year time period are similar.

FIGURE 22



LEWIS & CLARK COMMEMORATIVE STATES VISITED IN PAST THREE YEARS BY WAVE

TOTAL RESPONDENTS: 2000 VS. 2002



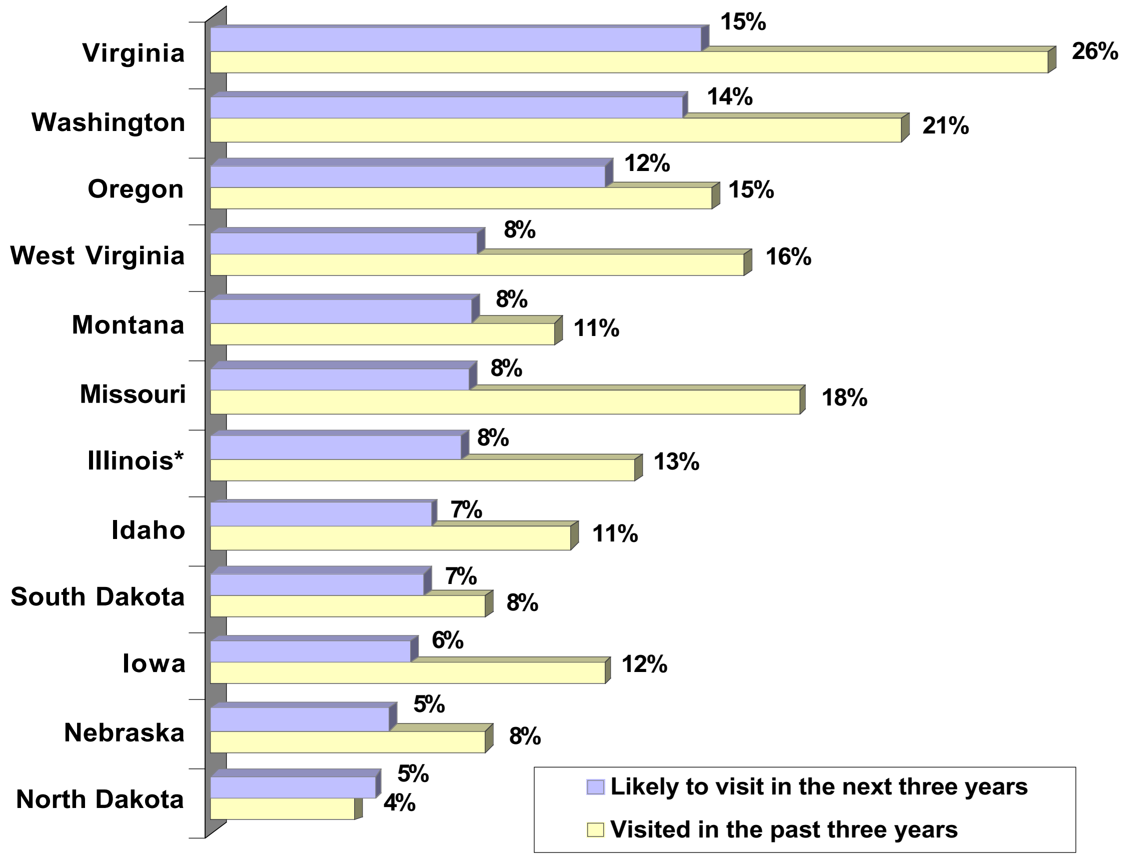
* **Illinois data is taken from NFO Plog Research 2000 and 2002 *American Traveler Survey***

Among the twelve states containing Lewis & Clark sites/ attractions, only three states attract more than 10 percent as destinations these Wave II respondents plan to visit: Virginia (15%), Washington (14%), and Oregon (12%). North Dakota (5%), Nebraska (5%) and Iowa (6%) appeal to fewer travelers. Compared with past travel behavior, Oregon and Montana appear most likely to gain, while Missouri and Iowa reveal the largest lag.

FIGURE 23

FUTURE AND PAST VISITATION TO LEWIS & CLARK COMMEMORATIVE STATES

TOTAL RESPONDENTS: 2002



* Illinois data is taken from NFO Plog Research 2000 and 2002 *American Traveler Survey*

Respondents who report interest in the Lewis & Clark story and those with a desire to visit a Bicentennial site are more attracted to these destinations, especially Oregon (16% and 22%), Montana (11% and 15%) and Idaho (10% and 15%). History buffs are also more likely to travel to Lewis & Clark Bicentennial states. Venturers show no discernable differences in preference from total respondents, other than their general inclination to travel more.

FIGURE 24
STATES LIKELY TO VISIT IN THE NEXT THREE YEARS
SELECTED CHARACTERISTICS

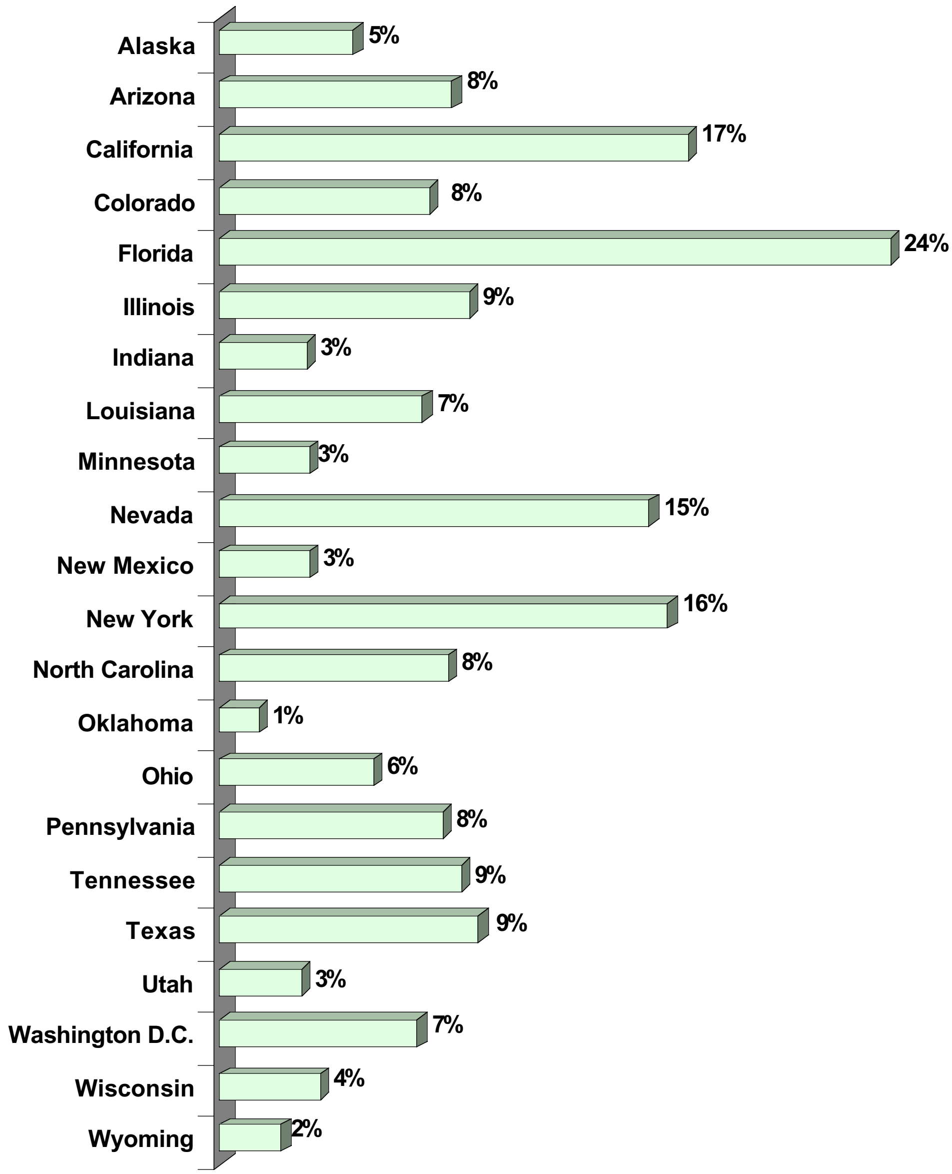
States	Total	Interested In L&C Story (59% of Total)	Interest In Visiting Bicentennial Site/Event (31% of Total)	History Buff* (37% of Total)	Venturer (12% of Total)
BASE:	1,674	989	511	594	187
Virginia	15%	18%	19%	18%	16%
Washington	14	16	19	18	18
Oregon	12	16	22	17	16
Missouri	8	10	14	10	6
Montana	8	11	15	12	9
West Virginia	8	10	13	11	9
Idaho	7	10	15	11	7
South Dakota	7	9	13	11	8
Ilinois	7	N/A	N/A	N/A	N/A
Iowa	6	8	12	8	5
Nebraska	5	7	9	8	6
North Dakota	5	7	10	9	8
None of the above	61	55	45	53	59

* Respondents who indicate that gaining knowledge of history or other cultures is an important (8+) reason for taking a vacation.
** Illinois was not included on the questionnaire so information was taken from NFO Plog Research 2002 *American Traveler Survey*.
*** Percentages may not sum to 100 due to rounding.

Plans for travel to states without Lewis & Clark sites/ attractions are not appreciably greater. Only high profile tourism states, such as Florida (24%), California (17%), and Nevada (15%) will attract significantly more U.S. adults (rep. sample) during the next three years than Bicentennial states. Plans for travel to states that have geographic proximity to the Lewis &

Clark route, such as Wyoming, Kansas, Utah, and Oklahoma are comparable, and include smaller percentages of travelers, see Figure 25.

FIGURE 25
LEISURE TRAVEL IN THE NEXT THREE YEARS TO STATES WITHOUT LEWIS & CLARK SITES
(U.S. ADULTS — SELECTED STATES)



* **Note**: **Data for these states is taken from NFO Plog Research 2002 *American Traveler Survey***

Few respondents expect to visit Lewis & Clark sites/attractions. Hence, it is not surprising that even fewer cite specific states in which they will see these attractions. Five percent are likely to visit Oregon as a result of the Bicentennial and four percent cite Montana or Washington.

FIGURE 26
STATES LIKELY TO VISIT LEWIS & CLARK SITES/ EVENTS IN DURING NEXT THREE YEARS
SELECTED CHARACTERISTICS

States	Total	Interested In L&C Story (59% of Total)	Interest In Visiting Bicentennial Site/Event (31% of Total)	History Buff* (37% of Total)	Venturer (12% of Total)
BASE:	1,674	989	511	594	187
Oregon	5%	7%	12%	7%	6%
Montana	4	5	9	6	5
Washington	4	7	12	6	7
Idaho	3	5	8	5	4
Missouri	3	5	8	5	4
Virginia	3	4	7	5	4
Iowa	2	3	6	4	3
Nebraska	2	2	4	3	3
North Dakota	[illegible]	[illegible]	[illegible]	[illegible]	3
South Dakota	[illegible]	[illegible]	[illegible]	[illegible]	3
West Virginia	2	3	6	4	3
None of the above	[illegible]	[illegible]	67	82	85

* Respondents who indicate that [illegible] an important (8+) reason for taking a vacation.
** Information for Illinois was not co[illegible] question.
*** Percentages may not sum to 100 [illegible]

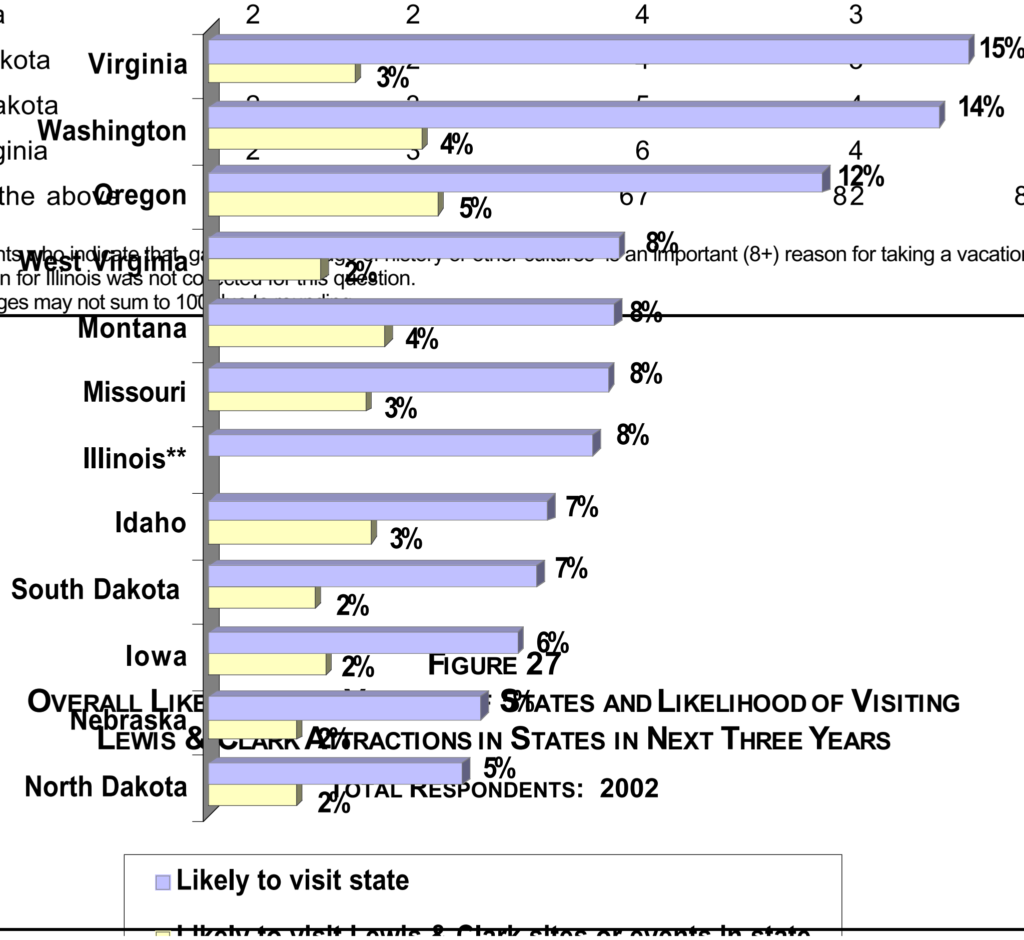


FIGURE 27
OVERALL LIKE[illegible] STATES AND LIKELIHOOD OF VISITING LEWIS & CLARK ATTRACTIONS IN STATES IN NEXT THREE YEARS
TOTAL RESPONDENTS: 2002

VISITING LEWIS & CLARK TRAIL SITES AND ATTRACTIONS

Lewis & Clark survey participants provided information pertaining to specific sites and attractions featuring the 1803-1806 Expedition. Familiarity with most of these is low except for:

- Monticello – VA (34%)
- Harper's Ferry – WV (31%)
- Jefferson National Expansion Memorial – MO (28%)
- The Columbia River Gorge – OR/WA (27%)

Sacajawea State Park – WA (13%), Ohio River Sites and Communities – OH (11%), Fort Clatsop – OR (11%), and Lewis & Clark Center – MT (10%) represent the other sites recognized by at least 10 percent of respondents.

Of course, visitation percentages are even lower, but the same four sites top the list (although in a different rank order):

- Monticello – VA (19%)
- Jefferson National Expansion Memorial – MO (19%)
- The Columbia River Gorge – OR/WA (16%)
- Harper's Ferry – WV (12%)

Recognition of and visitation to Lewis & Clark sites are considerably higher among history buffs and venturers, with the same top four Lewis & Clark attractions. Likely to serve as key segments for the success of the 2003-2006 Bicentennial Commemoration, their participation in the Commemoration, enjoyment, and willingness to spread the news of their positive experience upon their return home seems essential.

FIGURE 28
LEWIS & CLARK SITES AND ATTRACTIONS
TOTAL RESPONDING: 2002

Site/Attraction	Total		History Buffs (37% of Total)		Venturers (12% of Total)	
	Heard Of	Have Visited	Heard Of	Have Visited	Heard Of	Have Visited
BASE: Total Responding*						
Lemhi Pass — ID	6%	1%	11%	2%	7%	1%
Lolo Trail Hwy 12 — ID	7	2	10	3	7	1
Sergeant Floyd Monument — IA	5	1	9	3	9	2
Western Historic Trails Center — IA	7	1	11	3	11	3
Lewis & Clark Center — MT	10	2	18	4	15	5
Pompey s Pillar — MT	8	2	14	3	11	2
Fort Atkinson — NE	5	1	8	1	10	1
Lewis & Clark Visitor s Center — NE	7	1	9	2	11	2
Knife River Indian Village — ND	4	–	8	1	6	–
Fort Mandan — ND	6	1	11	2	6	1
Fort Clatsop — OR	11	7	13	7	10	8
The Columbia River Gorge — OR/WA	**27**	**16**	**38**	**20**	**28**	**19**
Lewis & Clark Area — SD	4	2	7	2	5	4
Spirit Mound — SD	6	1	9	1	9	2
Monticello — VA	**34**	**19**	**46**	**28**	**37**	**24**
Fort Canby — WA	5	3	7	3	6	2
Sacajawea State Park — WA	13	3	18	5	18	3
Harper s Ferry — WV	**31**	**12**	**42**	**17**	**33**	**15**
Ohio River Sites and Communities — KY/IL	11	9	17	13	9	13
Jefferson Nat l Expansion Memorial — MC	**28**	**19**	**38**	**26**	**27**	**22**
Lewis & Clark Museum/ Boathouse — MO	7	2	11	3	8	4
Camp Dubois — IL	3	1	6	2	4	2
Cahokia Courthouse — IL	6	2	9	4	5	4

* Percentages represent the proportion of respondents that gave any answer for each specific site/ attraction.

Since most Americans do not plan to visit Lewis & Clark sites/ events in general, it is not surprising that visitation to specific attractions will be correspondingly low. Except for the Columbia River Gorge – OR/WA (12%), Monticello – VA (12%), Harper's Ferry – WV (10%), and Jefferson National Expansion Memorial – MO (10%), fewer than 10 percent of respondents are likely (very/somewhat) to visit a specific Lewis & Clark site or attraction.

More encouraging results are gleaned from gauging interest among respondents who are familiar (very or somewhat) with the Bicentennial Commemoration. Familiarity percentages increase substantially, especially for (in order of percentage point increase):

- The Columbia River Gorge – OR/WA (65%, 37 percentage points higher than overall respondents)
- Lewis & Clark Center – MT (44%, 34 percentage points higher)
- Jefferson National Expansion Memorial – MO (59%, 31 percentage points higher)
- Pompey's Pillar – MT (33%, 25 percentage points higher)
- Fort Clatsop – OR (35%, 24 percentage points higher)
- Sacajawea State Park – WA (36%, 23 percentage points higher)

Respondents who are aware of the Bicentennial are more likely to visit all related attractions, with proportion increases ranging from four to eighteen percent.

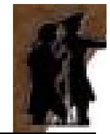
Results from the benchmark study results are consistent for the individual sites – while more Wave II survey respondents are interested in and familiar with the Lewis & Clark Expedition, fewer are likely to travel to specific Bicentennial sites or events (see Figure 29). A number of factors explain this drop-off, such as a sluggish economy and the slowdown in leisure travel. Fortunately, these conditions are cyclical, and targeted marketing campaigns that increase awareness can attract those that are familiar with Lewis & Clark but unaware of the 2003-2006 Bicentennial. About one-fourth of survey respondents need more information before deciding to travel to these locales. Lewis & Clark advertising and publicity will help to convert the undecided into visitors.

FIGURE 29
IMPACT OF AWARENESS ON VISITING LEWIS & CLARK SITES AND ATTRACTIONS
TOTAL RESPONDING VS. VERY/ SOMEWHAT FAMILIAR WITH THE 2003-2006 BICENTENNIAL: 2002

	Total		Very + Somewhat Familiar With Bicentennial (13% of Total)			
			Heard Of		Very + Somewhat Likely To Visit	
Site/Attraction	Heard Of	Very + Somewhat Likely To Visit	%	Difference*	%	Difference**
BASE: Total Responding* **						
Lemhi Pass — ID	6.3%	3.6%	25.6%	↑ 19.3%	12.8%	↑ 9.2%
Lolo Trail Hwy 12 — ID	6.9	4.4	28.0	↑ **21.1**	15.2	↑ **10.8**
Sergeant Floyd Monument — IA	5.2	3.2	16.3	↑ 11.1	8.5	↑ 5.3
Western Historic Trails Center — IA	6.8	3.7	19.2	↑ 12.4	9.2	↑ 5.5
Lewis & Clark Center — MT	10.4	5.4	44.3	↑ **33.9**	18.3	↑ **12.9**
Pompey s Pillar — MT	8.0	4.0	32.8	↑ **24.8**	15.3	↑ **11.3**
Fort Atkinson — NE	4.8	2.6	13.3	↑ 8.5	7.0	↑ 4.4
Lewis & Clark Visitor s Center — NE	6.8	3.0	20.2	↑ 13.4	7.3	↑ 4.3
Knife River Indian Village — ND	4.4	3.3	15.5	↑ 11.1	10.9	↑ 7.6
Fort Mandan — ND	5.8	3.2	27.3	↑ **21.5**	11.7	↑ 8.5
Fort Clatsop — OR	10.7	7.3	34.6	↑ **23.9**	23.8	↑ **16.5**
The Columbia River Gorge — OR	27.4	12.3	64.7	↑ **37.3**	30.8	↑ **18.5**
Lewis & Clark Area — SD	4.2	3.5	14.6	↑ 10.4	13.1	↑ 9.6
Spirit Mound — SD	6.3	3.4	17.8	↑ 11.5	11.6	↑ 8.2
Monticello — VA	33.9	12.0	53.8	↑ 19.9	22.0	↑ **10.0**
Fort Canby — WA	5.4	5.8	20.8	↑ 15.4	15.2	↑ 9.4
Sacajawea State Park — WA	12.9	6.8	36.2	↑ **23.3**	16.9	↑ **10.1**
Harper s Ferry — WV	31.2	10.4	51.2	↑ **20.0**	18.4	↑ 8.0
Ohio River Sites and Communities — OH	11.2	7.8	23.3	↑ **22.1**	16.3	↑ 8.5
Jefferson Nat l Expansion Memorial — MO	27.7	10.1	58.6	↑ **30.9**	21.9	↑ **11.8**
Lewis & Clark Museum/ Boathouse — M	6.7	4.6	16.7	↑ 10.0	11.9	↑ 7.3
Camp Dubois — IL	3.2	2.7	10.7	↑ 7.5	9.9	↑ 7.2
Cahokia Courthouse — IL	5.8	3.3	14.7	↑ 8.9	10.1	↑ 6.8

* **BOLD** indicates the percentage increase for those very/somewhat familiar with the Bicentennial is 20% or greater.
** **BOLD** indicates the percentage increase for those very/somewhat familiar with the Bicentennial is 10% or greater.
*** Percentages represent the proportion of respondents that gave any answer for each specific site/ attraction.

FIGURE 30



Detailed Likelihood of Visiting Lewis & Clark Sites and Attractions

Very/ Somewhat/ Not Very Interested in Visiting Bicentennial Site or Event: 2002 vs. 2000

	Very Likely		Somewhat Likely		Somewhat Unlikely		Very Unlikely		Need More Info.	
Site/Attraction	2002	2000	2002	2000	2002	2000	2002	2000	2002	2000
BASE: Total Responding*										
Lemhi Pass — ID	–	3%	5%	8%	10%	13%	63%	52%	22%	26%
Lolo Trail Hwy 12 — ID	1	2	6	7	9	13	63	53	22	26
Sergeant Floyd Monument — IA	1	1	4	6	10	13	64	55	21	25
Western Historic Trails Center — IA	1	2	5	6	11	13	63	55	21	24
Lewis & Clark Center — MT	2	2	6	11	12	14	57	47	23	26
Pompey s Pillar — MT	2	2	4	11	13	13	59	49	22	25
Fort Atkinson — NE	1	1	3	6	10	13	65	56	22	24
Lewis & Clark Visitor s Center — NE	1	1	4	6	9	14	64	55	22	24
Knife River Indian Village — ND	1	1	4	7	9	14	64	55	22	24
Fort Mandan — ND	1	1	4	7	10	14	64	54	22	24
Fort Clatsop — OR	2	5	9	11	9	14	59	47	21	23
The Columbia River Gorge — OR/WA	6	9	12	13	9	14	54	42	20	22
Lewis & Clark Area — SD	–	1	5	7	10	13	63	53	22	25
Spirit Mound — SD	1	2	5	7	10	13	64	54	21	25
Monticello — VA	3	8	13	15	13	13	52	43	20	22
Fort Canby — WA	2	3	6	10	10	12	60	50	22	25
Sacajawea State Park — WA	3	3	8	11	11	13	56	47	23	25
Harper s Ferry — WV	4	4	10	12	11	14	55	47	20	23
Ohio River Sites and Communities — OH	3	4	7	11	11	14	57	47	22	25
Jefferson Nat l Expansion Memorial — M	4	N/A	10	N/A	13	N/A	53	N/A	20	N/A
Lewis & Clark Museum/ Boathouse — M	2	N/A	5	N/A	12	N/A	60	N/A	22	N/A
Kansas City Area — MO	N/A	3	N/A	10	N/A	15	N/A	50	N/A	22
St. Louis & St. Charles Sites — MO	N/A	3	N/A	11	N/A	15	N/A	50	N/A	21
Camp Dubois — IL	1	N/A	3	N/A	11	N/A	62	N/A	23	N/A
Cahokia Courthouse — IL	1	N/A	4	N/A	11	N/A	62	N/A	22	N/A

NOTE: Missouri sites were changed for the 2002 survey from Kansas City Area and St. Louis & St. Charles Sites to Jefferson National Expansion Memorial and Lewis & Clark Center; Illinois sites were added for the 2002 survey (no specific Illinois sites were included in Wave I).

* Percentages represent the proportion of respondents that gave any answer each specific site/ attraction.

COMPONENTS OF LEISURE TRAVEL

TRANSPORTATION AND LODGING

Overall, the majority of U.S. adults would stay in a hotel/ motel/ bed & breakfast (69%) if they were to visit a Lewis & Clark site or attraction. Six in ten (61%) would probably drive to Bicentennial locales, and about half (47%) would fly and rent a car.

Trends appear by age and income. Younger (18-39) and affluent ($75,000+) respondents are most likely to (young vs. affluent vs. average):

- Stay in hotel/motel/B&B (75% vs. 73% vs. 69%)
- Drive (68% vs. 64% vs. 61%)
- Fly and rent car (54% vs. 54% vs. 47%)
- Travel with children (54% vs. 31% vs. 29%)

Several options are rated higher with younger (18-39 years of age) individuals and those earning under $40,000, including (young vs. lower incomes vs. average):

- Camping (32% vs. 24% vs.19%)
- Staying with relatives (28% vs. 23% vs. 18%)
- Staying in RV/ campground (26% vs. 19% vs. 17%).

FIGURE 31
OVERALL TRANSPORTATION AND LODGING FOR LEWIS & CLARK SITE/ ATTRACTION VISIT
DEMOGRAPHIC GROUPS: % (YES/ MAYBE)

If you were to visit any of the Lewis & Clark sites and attractions, you	Total	Age 18-39 (25%)	Age 40-54 (35%)	Age 55+ (41%)	Income Under $40k (28%)	Income $40k up to $75k (36%)	Income $75k or more (36%)
BASE:	1,674	405	569	677	475	601	598
Would stay in hotel/ motel/ B&B	69%	75%	72%	63%	64%	68%	73%
Would probably drive	61	68	64	56	58	61	64
Would probably fly and rent car	47	54	51	41	40	46	54
Would travel with children	29	54	35	10	26	30	31
Would probably take a bus tour	22	16	18	28	26	21	19
Would camp	19	32	21	9	24	19	15
Would stay with relatives	18	28	15	13	23	18	13
Would probably stay in RV/ campground	17	26	20	11	19	18	16

Wave II respondents who have any interest (very/ somewhat/ not very) in visiting Bicentennial sites or events can be compared to their Wave I counterparts. Percentages are similar between waves, except those in 2002 are more likely to consider flying and renting a car (53% vs. 46%) and bus tours (25% vs. 19%). A strong majority of those with at least some interest in visiting a Lewis & Clark attraction (69% in Wave II) continue to favor driving. This bodes well for locales tied to the Bicentennial Commemoration, since "drive-to" destinations are benefiting from the present slump in air travel. A recent affinity for "short getaways" (1-3 nights) and a preference for domestic travel may also foster visitation rate increases.

FIGURE 32
TRANSPORTATION AND LODGING FOR LEWIS & CLARK SITE/ ATTRACTION VISIT BY WAVE

VERY/ SOMEWHAT/ NOT VERY INTERESTED IN VISITING BICENTENNIAL SITE OR EVENT: 2002 VS. 2000
(YES AND MAYBE RESPONSES)

WHY PEOPLE TAKE VACATIONS

The desire to have fun is the most important reason for taking a vacation (83% overall). As seen in Wave I, more than six U.S. adults in ten 2002 also cite *relax/ get rid of stress* (66%), *see and do new things* (62%), and *no schedules to meet* (61%) as leading reasons.

Among history buffs, a large increase in traveling to *gain knowledge of history/ cultures* occurs in Wave II (36%, compared to 27% in Wave I). These individuals (Wave II history buffs) mention these elements of travel much more frequently than overall respondents (in order of percentage difference):

- *Travel important part of my life* (56% of Wave II history buffs vs. 32% of U.S. adults)
- *See/ do new things* (88% vs. 62%)
- *Enrich my perspective on life* (70% vs. 45%)
- *Feel alive/ energetic* (66% vs. 48%)

Venturers, by nature, travel more and place more emphasis on the *importance of travel in their lives* (60% vs. 34% of U.S. adults). All other reasons for taking vacations are chosen by a greater proportion of venturers, especially (in order of percentage difference):

- *Feel alive/ energetic* (72% of venturers vs. 48% of U.S. adults)
- *Enrich my perspective on life* (67% vs. 45%)
- *Vacations are a romantic time* (44% vs. 23%).

FIGURE 33
WHY PEOPLE TAKE VACATIONS
SELECTED CHARACTERISTICS (8+ ON A 10 POINT IMPORTANCE SCALE): 2002 VS. 2000

	Total		History Buffs (37% of Total)		Venturers (12% of Total)	
Why do you like to take vacations?	**2002**	**2000**	**2002**	**2000**	**2002**	**2000**

BASE:	1,674	1,400	594	362	187	297
Have fun	83%	89%	90%	91%	94%	94%
Relax/ get rid of stress	66	71	69	68	76	71
See/ do new things	62	62	88	87	79	77
No schedules to meet	61	66	67	70	78	73
Spend more time with spouse/ family	55	57	58	58	68	63
Feel alive/ energetic when travel	48	54	66	71	72	68
Enrich my perspective on life	45	51	70	75	67	70
Gain knowledge of history/ cultures*	36	27	100	100	51	38
Travel important part of my life	34	33	56	55	60	47
Nice to have others serve/ wait on me	29	30	33	37	37	35
Spend more time with friends	25	29	27	32	43	33
Vacations are a romantic time	23	23	31	31	44	36
Low risk/ controlled outdoor adventure	18	17	25	27	27	23
Seek solitude/ isolation	16	16	20	23	21	21
Test physical abilities	11	11	17	18	24	24

* This characteristic accounts for the proportion of respondents identified as History Buffs .

Separating Lewis & Clark survey respondents by age and income provides additional insight into why people travel. Younger respondents travel for more reasons than the general population, except to *gain knowledge of history/ cultures* and *enrich my perspective on life*. Higher earning survey participants also cite these reasons for taking vacations more frequently than those who earn less, especially, *spend more time with spouse/ family*, *vacations are a romantic time*, and *travel is an important part of my life*, see Figure 34.

FIGURE 34
DEMOGRAPHIC COMPARISON OF WHY PEOPLE TAKE VACATIONS
DEMOGRAPHICS: MEAN SCORES

	Age			Income		
Why do you like to take vacations?	**18-39 (25%)**	**40-54 (35%)**	**55+ (41%)**	**Under $40k (28%)**	**$40k up to $75k (36%)**	**$75k or more (36%)**

BASE:	405	569	677	475	601	598
Have fun	9.5	9.2	8.5	8.8	9.0	9.1
Relax/ get rid of stress	8.4	8.4	7.1	7.7	7.9	8.0
See/ do new things	8.0	8.0	7.8	7.5	8.0	8.1
No schedules to meet	7.9	7.9	7.4	7.8	7.7	7.7
Spend more time with spouse/ family	7.9	7.5	6.5	6.6	7.3	7.6
Feel alive/ energetic when travel	7.2	7.2	7.0	7.0	7.1	7.2
Enrich my perspective on live	6.7	6.8	7.0	6.6	6.9	7.0
Gain knowledge of history/ cultures*	**5.8**	**6.3**	**6.7**	**6.2**	**6.4**	**6.4**
Travel important part of my life	6.1	6.0	6.1	5.6	6.2	6.4
Nice to have others serve/ wait on me	5.6	5.7	5.0	5.1	5.5	5.7
Spend more time with friends	5.4	5.1	5.3	5.4	5.4	5.1
Vacations are a romantic time	5.7	5.3	4.7	4.5	5.2	5.5
Low risk/ controlled outdoor adventure	5.1	5.0	4.1	4.7	4.7	4.6
Seek solitude/ isolation	5.1	5.0	4.1	4.7	4.7	4.6
Test physical abilities	4.7	4.0	3.4	3.9	4.1	3.8

* This characteristic accounts for the proportion of respondents identified as History Buffs .

INFORMATION SOURCES

Word of mouth remains the primary source of information for leisure travel planning. Over half (56%) of survey respondents mention their use of *friends/ relatives.* Technology sources follow, such as *Internet travel sites* (39%), *search engines* (39%), and *airline web sites* (38%). Other resources cited by a third or more of respondents include *travel agents* (35%), *toll-free numbers* (35%), and *auto club brochures* (32%).

History buffs use more resources when planning leisure travel respondents than the "typical" traveler. Differences appear to be greatest (on a percentage basis) for off-line sources of information, such as *auto club brochures*, *travel guides*, *travel magazines*, and *book stores*. Individuals that are interested in the Lewis & Clark story more closely match total survey respondents.

Leisure travel planning has changed considerably since Wave I. Internet usage has risen, especially niche/specialty sites. Respondents in the most recent survey are much more likely to use:

- *Internet travel sites* (39% of Wave II respondents vs. 18% of Wave I respondents)
- *Airline web sites* (38% vs. 23%)
- *E-mail notification* (21% vs. 12%)
- *Tourism bureau web sites* (19% vs. 13%)

Use of several off-line resources declines in Wave II, most notably *travel agents* (35% of Wave II respondents vs. 49% of Wave I respondents) and *toll-free numbers* (35% vs. 43%). This trend holds true for history buffs and those interested in the Lewis & Clark story as well.

FIGURE 35
TRAVEL PLANNING INFORMATION SOURCES
SELECTED CHARACTERISTICS: 2002 VS. 2000

	Total		Interested In L&C Story (59% of Total)		History Buffs (37% of Total)	
Travel information and planning sources used in past 12 months	2002	2000	2002	2000	2002	2000

BASE:	1,674	1,400	989	791	594	362
Friends/Relatives	56%	61%	59%	64%	61%	61%
Internet Travel Sites	**39**	**18**	**40**	**19**	**43**	**20**
Search Engines**	39	N/A	42	N/A	42	N/A
Internet/ Web**	N/A	41	N/A	44	N/A	40
Airline Web Sites	**38**	**23**	**39**	**25**	**42**	**24**
Travel Agents	35	49	34	51	40	53
Toll-free #s	35	43	39	46	41	44
Auto Club Brochures	32	34	36	37	38	41
State/ Local Tourism Bureaus	23	22	28	26	32	32
Hotel Brochures	22	23	24	24	27	21
E-mail Notification	**21**	**12**	**22**	**13**	**27**	**14**
Tourism Bureau Web Sites	**19**	**13**	**22**	**14**	**24**	**17**
Travel Guides	17	17	19	20	26	26
Cruise Line Brochures	17	9	18	9	20	11
Travel Magazines	15	16	17	18	23	23
Tour Company Brochures*	12	N/A	13	N/A	17	N/A
Book Stores	10	12	11	16	16	21
Travel Television Programs*	10	N/A	12	N/A	15	N/A
Travel Agency Web Site	6	3	7	4	9	4
CD — ROM	1	2	2	3	2	2

* Data for this source of information was not collected in Lewis & Clark Wave I
** Wording for this source of information was changed but generally reflects similar methods of researching travel services

Friends/ relatives provide information for leisure travel planning to over half of all age and income groups. Generally, those that favor Internet resources are younger (18-39) and earn more ($75,000+). When planning leisure travel, members of those groups most often mention (age and income):

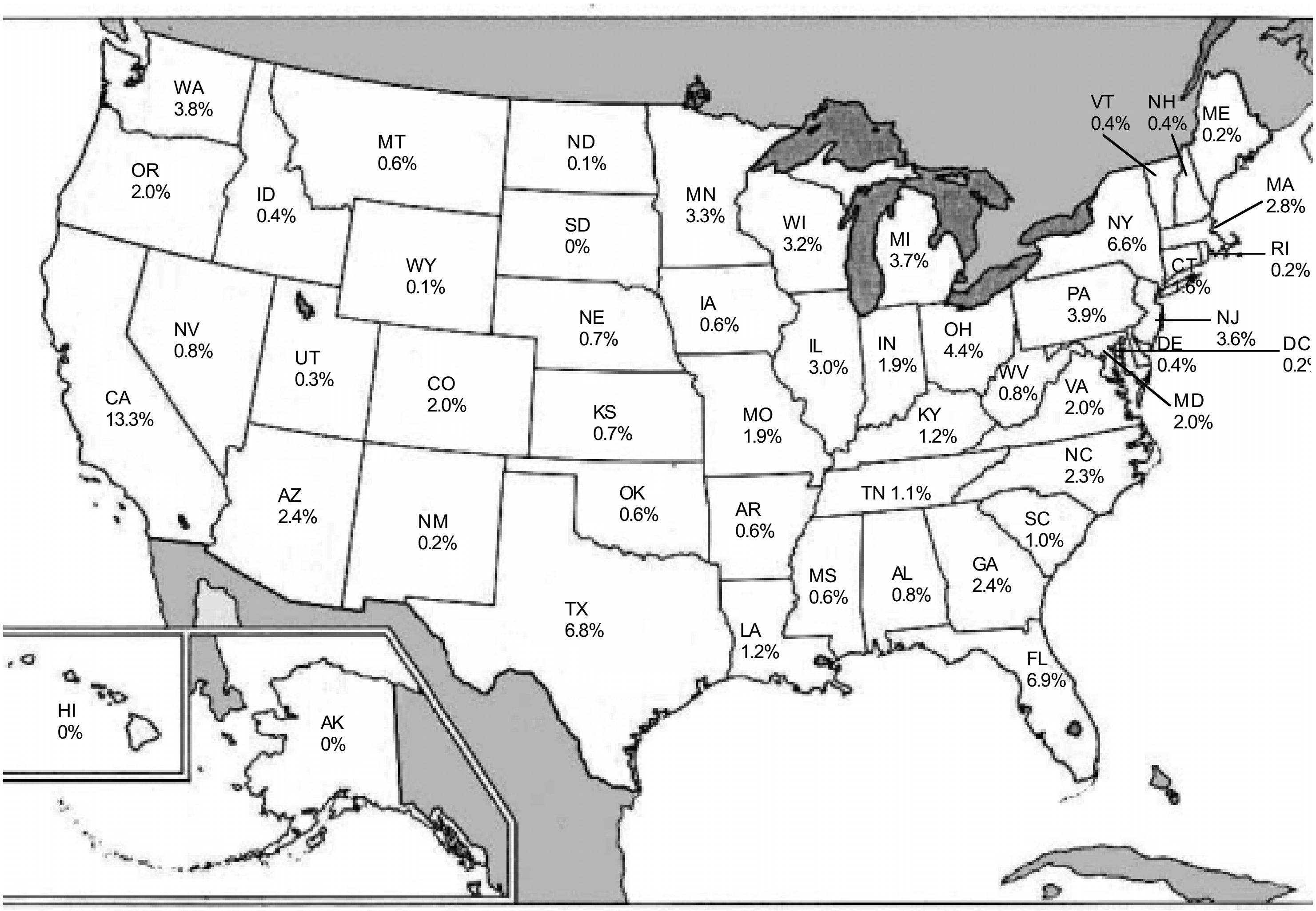
- *Search engines* (57% of respondents between 18-39 and 48% of respondents who earn $75,000+)
- *Internet travel sites* (50% and 49%)
- *Airline web sites* (47% and 48%)

Older Lewis & Clark survey respondents are more reachable than other people via *travel agents*, *cruise line brochures*, *tour company brochures*, *cruise line brochures*, and *travel magazines*, see Figure 36.

FIGURE 36
DEMOGRAPHIC COMPARISON OF TRAVEL PLANNING INFORMATION SOURCES
DEMOGRAPHICS

	Age			Income		
Travel information and planning sources used in past 12 months	**18-39**	**40-54**	**55+**	**Under $40k**	**$40k Up To $75k**	**$75k Or More**
BASE:	405	569	677	475	601	598
Friends/Relatives	64%	54%	54%	57%	54%	56%
Internet Travel Sites	50	44	28	25	38	49
Search Engines	57	47	23	27	40	48
Airline Web Sites	47	42	30	28	37	48
Toll-free #s	29	44	32	27	37	40
Travel Agents	27	33	41	27	32	43
E-mail Notification	24	23	17	16	20	25
Hotel Brochures	23	25	19	18	24	24
Auto Club Brochures	21	36	34	24	31	38
State/ Local Tourism Bureaus	18	27	24	19	26	25
Tourism Bureau Web Sites	18	25	14	11	19	25
Travel Guides	18	18	16	12	18	20
Book Stores	13	11	9	7	9	14
Cruise Line Brochures	12	15	23	14	16	21
Travel Magazines	11	16	17	11	15	17
Travel Television Programs	8	11	11	7	12	11
Travel Agency Web Site	6	7	6	5	6	7
Tour Company Brochures	5	9	17	8	12	13
CD — ROM	–	2	1	1	2	2

FIGURE 37
RESPONDENT DISTRIBUTION



APPENDIX

Explanation of Key Terms

Psychographics

NFO Plog Research is a leader in the development of psychographic scales for use in survey instruments. One of these is the dimension of *venturer/dependable* (allocentric/psychocentric), which is fundamental to travel research and helps to summarize important characteristics of travel behavior.

Venturer/Dependable: Once labeled as allocentrics/psychocentrics, the names have been changed to terms that are more user-friendly and more relevant to their implications.

The *venturer/dependable* concept has been utilized for several travel-related purposes: to position or reposition destinations successfully, introduce new destinations, determine appropriate advertising for various kinds of travelers, serve as the basis for creative development in advertising, focus the marketing programs of travel providers, and introduce new products and move these products through the spectrum of the population. It is based on psychologically oriented travel research from a nationwide sample.

This dimension distributes relatively normally across the population, with a small percentage (2 1/2% to 4%) constituting either pure *venturers* or *dependables*, a larger number that can be categorized as near *venturers* or near *dependables* (about 17% in each case), and the majority of the population in the middle of the curve, with leanings to one direction or the other (about 66% of the total). Knowing where a person fits on this curve tells a lot about their travel behavior, including the types of products they like, the places they will probably select for travel, the kind of travel experiences they would like to have, and the advertising that most appeals to them.

In short, *venturers* venture. A *venturer* is an intellectual leader among his/her peers and, in fact, for much of what goes on in society. The most defining characteristic is that these individuals are adventurous and constantly seek new experiences (including travel experiences). They have a high degree of self-confidence that leads to the willingness to be venturesome, tend to be relatively achievement oriented, and have a positive view about life.

Venturesomeness tends to correlate only moderately with income because their achievement drive does not necessarily equate with a passion for money or power. Rather, these individuals like to do well at whatever they pursue, which means that they are also excellent teachers, scientists, lawyers, or whatever. Being successful within a field typically means you rise to the head of that field, although pay scales may be quite disparate, such as that between educators and those engaged in financial markets.

Venturers seek out new destinations before they have been discovered by others, are quite willing to get along by eating local food and using local accommodations (not typical hotels or motels), and are quite comfortable in cultures where they may be alone and do not speak the language. Venturers are heavy air travel users because of its convenience. They typically seek new destinations on a continuous basis rather than return to familiar places they have visited before. When they return home and speak about their experiences, they tend to influence others around them who now want to visit those destinations. As a result, a new leisure spot in the world is probably on the way to being discovered and faces all of the ensuing problems of rapid growth.

Dependables, on the other hand, follow. They can be characterized by indecisiveness, a low level feeling of dread or anxiety that tends to pervade their lives, and a desire to make safe and comfortable choices. Thus, they primarily use name-brand products that have high identity in the marketplace because they view these products as "safe" choices. They believe that these must be good products, otherwise so many people would not be using them. They tend to select destinations that are very well known and over-developed. Once having "discovered" a destination that they like, they are likely to return to it year after year. Their favorite areas most often are very warm sun-'n'-fun spots that also offer an atmosphere similar to what they experience at home, i.e., fast food restaurants, movie theaters, video-game parlors, etc.

In general, it is better to position products for the *venturer* side of the scale, since these persons influence others who are not as venturesome, but the reverse never happens . . . *dependables* do not influence those in the center or near *venturers*.

With this psychographic concept in mind, the destination life cycle is easier to understand.

DESTINATION LIFE CYCLE

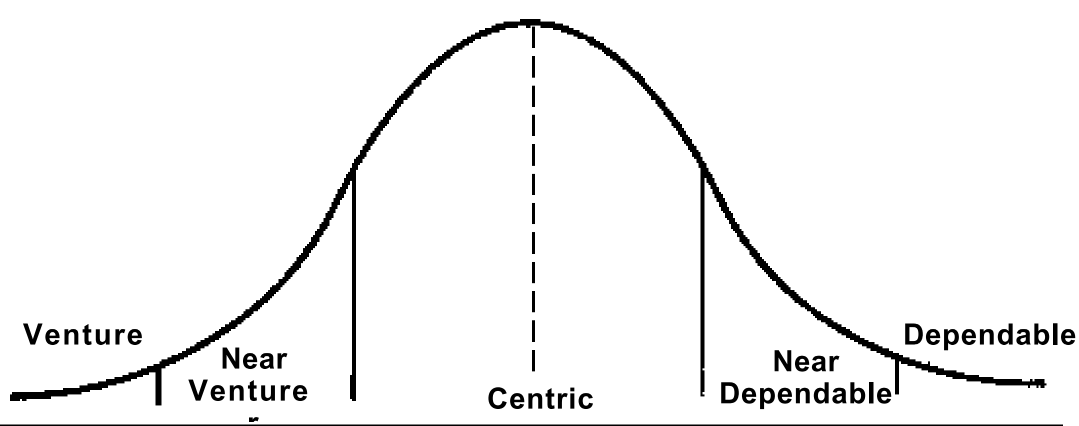
Destinations, like people, have life cycles. These cycles approximate predictable patterns from "birth," to "maturity," to "old age," as explained below.

At each stage, a destination appeals to different types of travelers. There is an ideal "age" for a destination, what might be called "young adulthood," when it appeals to the right kind of travelers – a placement between *centric* and near-*venturer*. Protecting a destination from passing that magical point into a later state of decline is the combined job of local planners, developers, and promotions people. Identifying the types of travelers who are attracted to a destination categorizes a place as *venturer*, near-*venturer*, *centric*, near-*dependable*, or *dependable*, in its feel and also places a destination in its life cycle (birth, maturity, decline). The following chart illustrates the life cycle.

FIGURE 38
PSYCHOGRAPHIC CURVE

DESTINATION GROWTH BEGINS WITH VENTURERS

Pure *venturers*, as noted earlier, are most interested in discovering new places to visit– the undiscovered or the passed over that time forgot. They require little in support services, such as hotels or restaurants. They relish anything that is unique, more natural and unspoiled, and they return home with cherished memories of these experiences that they talk about with friends and relatives. Their enthusiastic descriptions of recent trips convince near-*venturer* acquaintances that they, too, should visit these wondrous spots. The process of



destination growth has begun.

More travelers arrive as the word spreads, with a corresponding development of hotels, restaurants, and sightseeing activities to accommodate the new visitors. With the arrival of near-*venturers*, the destination has now been discovered by jet-setters whose pleasures and social presence create worldwide attention in the press. The publicity typically is pervasive, persuasive, and almost always favorable, enticing the next group of travelers on the psychographic scale, the *centrics* with *venturer* leanings.

Growing Numbers of Visitors Change Destinations

Growth and development continue unabated and the destination begins to take on a commercial and touristy look. Small and large businesses begin to sell local crafts and native clothes, and the first of the lower quality souvenir shops appear. The destination has reached its maximum potential, in terms of dollar volume spent by visitors. And, the true *venturers*, and even many near-*venturers*, have long since vanished to seek other undiscovered or off-the-beaten-path settings around the world.

Until now, the destination has appealed to an increasing slice of the population. But, once it passes the *mid-centric* mark, a state of decline begins. It appeals to diminishing segments of the population, reversing the trend of its early growth phase. The emergence of fast-food restaurants, movie theaters, video parlors, bars, and entertainment lounges means that a more *dependable* type of personality dominates the visitor group. Another negative impact emerges when dependables become a larger proportion of visitors. It means that not only are fewer people visiting, but those that do arrive tend to spend less and stay for shorter periods of time than their more *venturesome* counterparts. Hotels and other providers begin to discount their products in an attempt to rekindle declining interest in the destination.

Perfect Positioning

This life cycle demonstrates that the perfect positioning for any destination is at a near-*venturer*/slightly *centric* point. It can draw from a broad array of personality types who have heard about it and want to visit. And, as noted before, opinion leadership always comes from people who are somewhat more venturesome than those they influence. Thus, a destination positioned at the young adulthood stage can draw across a broad spectrum of potential visitors. A much smaller market potential exists for a destination that is more mature. Most people who serve on planning boards for destination areas fail to recognize the necessity of maintaining the unique character of a destination in order to preserve its original appeal. A brief review of the importance of establishing clear goals for growth follows. A list of warning signs that indicate a destination is "topping out" is included.

Importance of Growth Strategies and Signs of Deterioration

The positioning described above applies to most destinations – where destinations rise and peak by convincing *venturer* and near-*venturer* personality types to visit. However, there are exceptions. Some destinations intentionally appeal to more *dependable* types: such as "fun-'n'-sun" resorts and islands, theme parks, gaming destinations, and music headquarters (Nashville and Branson).

However, all destinations must develop strategies for maintaining the growth phase because they are crucial to extending a destination's life cycle. Destinations cannot remain at their peak unless they are protected via careful planning. Instead, they march into maturity and eventually decline. Pressure to continuously exceed prior years' visitation rates and the introduction of a destination to new audiences results in a larger and larger base of potential travelers . . . that is, until *venturers* drift away. Then near-*venturers* stop coming because the destination no longer conveys a sense of exclusivity. The trend continues. Once the mid-point is passed, fewer and fewer people are attracted to the destination.

As *dependables* become the major audience, more subtle factors become important. *Dependables* generally do not travel as much, tend to stay closer to home, and usually do not spend as much. Thus, local operators of hotels, restaurants, and tourist attractions, now hooked on steady growth, face declining tourist populations without knowing why.

Blame falls to the general economy, or to unfavorable press coverage of local conditions. Meanwhile, development continues in anticipation of never-ending growth. Hotel rooms are added and shopping complexes replace open space and natural resources. The warning signs are numerous:

- Occupancy rates fall
- Room rates, as a result, drop in an effort to entice visitors
- Low cost package trips begin to dominate revenue sources
- The destination loses its sense of uniqueness
- New advertising campaigns are developed because the old one is no longer effective
- Fast food and game parlors begin to dominate
- Properties slip, gradually, into a state of disrepair
- Marketing meetings concentrate on schemes to entice disappearing visitors
- Gaming facilities and casinos are seriously discussed, then planned and built

Awareness of deterioration is made more problematic by the fact that a negative image can be developing while a destination seems to be growing. The number of visitors can actually be increasing from the good word that has spread about what a great place it is to visit when, in fact, a resort has already started on a downward path. The new message, from the most recent visitors, implies that it no longer offers the quality of experience it once had. Ultimately the negative word-of-mouth images will prevail.

Rather than seeking a constantly increasing number of visitors, long-term success of a destination is more likely achieved with an eye toward balance between marketing promotions and the appropriate numbers of the right types of visitors. A maximum effective size, in terms of the number of tourists that can be sent home happy, exists for most resorts and destinations. The trick is to bring a leisure destination to its correct size for maximum tourist satisfaction and not allow it to exceed that number.

QUESTIONNAIRE